

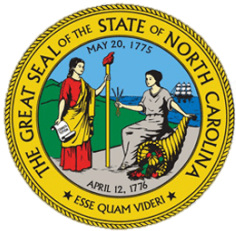
# North Carolina COVID-19 Vaccine Management System (CVMS) Provider Portal

## Step 6 - Receive and manage vaccine inventories

### User Guide

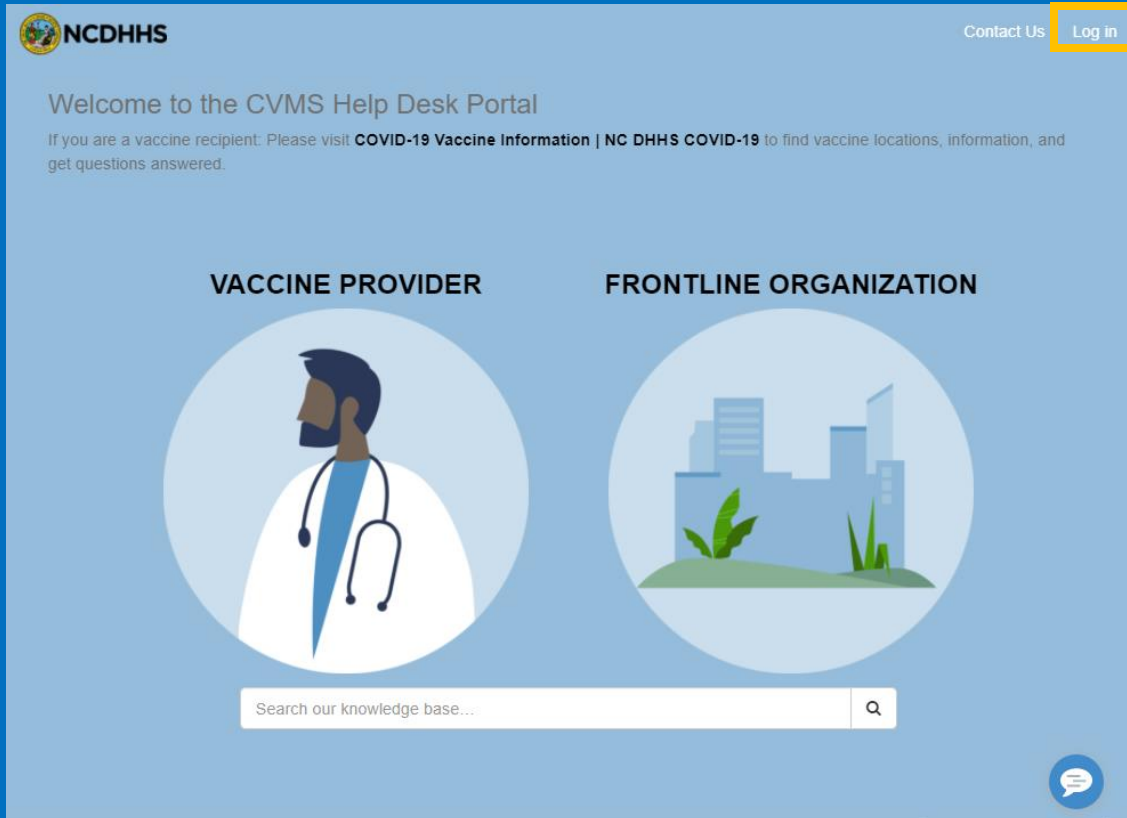
Version 18

September 15, 2021



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal\* at

[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

You can also call the COVID-19 Vaccine Provider Help Desk at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Desk is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday: 8 am – 4 pm ET

Sunday: Closed

\* On the home page of the CVMS Help Desk Portal, select **Log in** at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account by clicking '**Log in**' then '**Register**' on the left side of the screen
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

# Table of Contents (1 of 2)

	Pages
<b>Overview</b>	<b>5 – 6</b>
<b>Receiving Vaccines</b>	<b>7 – 26</b>
Track Vaccine Shipment Notice	9 – 14
Add New Inventory	15 – 23
Declare Availability for More Allocations by the State	24 – 26
<b>Exchanging Vaccines Through the Marketplace</b>	<b>27 – 73</b>
Find your Associated Hub	31 – 36
Offer your Surplus of Vaccines	37 – 50
Request Additional Vaccines	51 – 69
Maintain your Requests Posted in the Vaccine Marketplace	70 – 73
<b>Transferring Vaccines Between Two Providers</b>	<b>74 – 94</b>
Initiate an Outbound Transfer or Redistribution	76 – 89
Receive an Inbound Transfer or Redistribution	90 – 94
<b>Declaring Inventory Deprecation Events</b>	<b>95 – 113</b>
Log a Vaccine Wastage	97 – 102
Log Insufficient Quantity	103 – 108
Edit Deprecation Events	109 – 113

## Table of Contents (2 of 2)

	Pages
<b>Other Inventory Operations Available in CVMS</b>	<b>114 – 140</b>
Edit or Update Vaccine Inventory Record Details	115 – 120
Mark a Vaccine Inventory as Complete or Reserved for Future Use	121 – 126
Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory	127 – 133
Receive State Sponsored Contract Inventories	134 – 137
Access the Inventory Summary Report	138 – 140
<b>Appendix</b>	<b>141 – 147</b>
Next Steps	143 – 143

# Overview

# Inventory Management Overview

**NCDHHS CVMS Provider Portal**

Home Recipient Appointments Locations Bulk Registration More ^

Scan or type a barcode

**Add Waste Insufficient Quantity Inbound Transfer Outbound**

**Vaccine Inventories**  
All Vaccine Inventories ▾

2 Items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

	V. ↑ ↓	N... ▾	Ac... ▾	Pr... ▾	Lot ▾	To... ▾	D... ▾	D... ▾	Ex... ▾	D... ▾	St
1	Lot 1...	8077...	Traini...	Mode...	1						
2	Lot 1...	5926...	Traini...	Pfizer...	1						

**New Vaccine Inventory: New Vaccine**

**Reminder(s)**  
Moderna Instructions  
Moderna can now be shipped in 10 doses/vial (NDC: 80777-273-99) or 14 doses/vial packaging (NDC: 80777-273-98). Please ensure you select the correct Moderna Vaccine Product.

**Fields**

\*Account ⓘ  
Search Accounts... 🔍

\*Expiration Date  
Date Time  
5/14/2021 12:48 PM

\*Vaccine Product  
Search Vaccine Products... 🔍

\*Lot  
LotXXX

\*Vaccine Inventory Name  
FED Lot XXX Delivery 05/14/2021

Date Received  
Date Time  
5/14/2021 12:48 PM

\*Total Doses ⓘ

Extra Doses ⓘ

Federal Allocation? ⓘ  
☒

State Sponsored Contract ⓘ  
☐

**Shipment Details**

Cancel Save & New Save

To provide NCDHHS with an accurate picture of the COVID-19 vaccine inventory available across all provider locations, you will need to update the CVMS Provider Portal with COVID-19 vaccine inventory receiving, reductions, deprecations, and transfers / redistributions to other providers or other locations within your organization.

If you have a surplus of COVID-19 vaccine doses or if you need additional COVID-19 vaccine doses, use the **VACCINE MARKETPLACE** to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

The processes discussed in this training guide are primarily for users with a **Healthcare Location Manager** profile.

*You will also need to:*

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers. Internet Explorer or older versions of Edge (non-Chromium) browsers are not supported.
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

**Now, let's get started!**

# Receiving Vaccines



# Overview of the COVID-19 Vaccine Inventory Receiving Process



1

Once a COVID-19 vaccine shipment is on its way, the Primary Vaccine Coordinator will receive an email notification.

From the homepage, click to the Shipments page to **review shipment information**.

A list of shipments will be on the Shipments page.

You will be able to view on this page shipment information, including date shipped, quantity shipped, tracking information, vaccine lot #, NDC #, expiration date, and the manufacturer name.



2

When you **receive** a COVID-19 vaccine shipment, you will **add the inventory** to your location's overall COVID-19 vaccine inventory.

Navigate to the Vaccine Inventory tab and click add.

Enter all needed details into the prompted fields for the shipped COVID-19 vaccine inventory.

Review and save the inputted information.



3

Need to make updates to a Vaccine Inventory Record? You will be able to edit a few fields including the Extra Doses field and the Vaccine Inventory Record Name. You will also be able to update the Vaccine Inventory Status to Complete when there are no more doses available.

All edits to the Vaccine Inventory Record will be tracked.

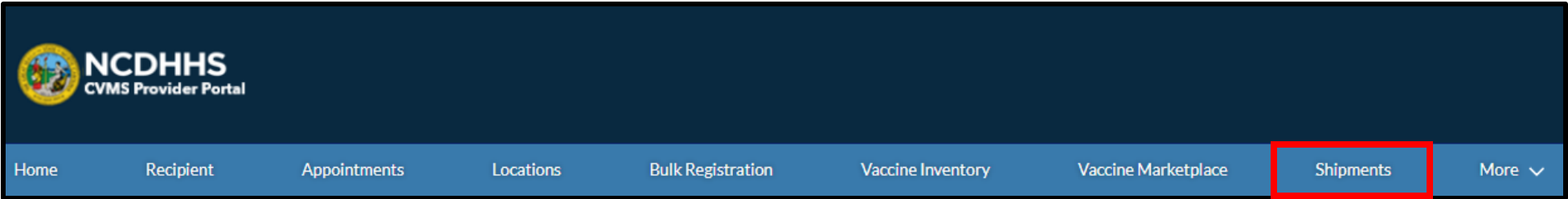


# Track Vaccine Shipment Notice

# Step 1 of 4: Navigate to Shipments

Once a COVID-19 vaccine Inventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

- 1. At the top of your home page, click **SHIPMENTS**
- 2. After clicking **SHIPMENTS**, you will be directed to the **SHIPMENTS PAGE**



## Audience

Healthcare  
Location  
Manager

## Tips

The Primary Vaccine Coordinator will be notified when a COVID-19 vaccine shipment is on its way. The Primary Vaccine Coordinator was identified by the Organization Administrator during the enrollment process in the CVMS Provider Enrollment Portal.

# Step 1 of 4: The Primary Vaccine Coordinator is also Notified by Email

Primary Vaccine Coordinators will also be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

The Primary Vaccine Coordinator will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

*Note: Email will come from [nccvms@dhhs.nc.gov](mailto:nccvms@dhhs.nc.gov)*

Hello John Smith,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

- Date Shipped: 02/01/2021
- Quantity Shipped: 300
- Manufacturer: Moderna TX
- NDC: 80777-0273-99
- Lot Number: 032L20A
- ExIS Order ID: FLU920001FC01302021

Shipment Tracking Information:

- Carrier: UPS1
- Shipment Tracking Number: 1Z126W010100941170

Need support? Submit your question to the help desk here: [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

Thank you, NC Department of Health and Human Services

Division of Public Health

 NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**

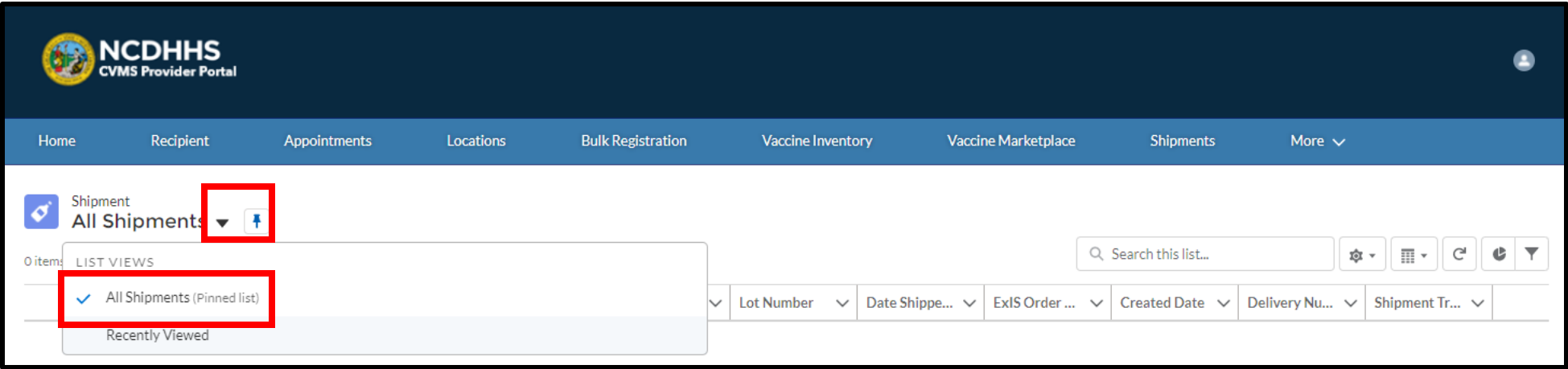
# Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the ‘All Shipment’ records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click **ALL SHIPMENTS**
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

## Audience


Healthcare  
Location  
Manager



# Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD**. This means that your Vaccine Shipment record will always be associated to a specific order.

- 1. Locate the **SHIPMENT ID**
- 2. Click the **SHIPMENT ID HYPERLINK**
- 3. You will be directed to the **VACCINE SHIPMENT RECORD**

Home   Recipient   Appointments   Locations   Bulk Registration   Vaccine Inventory   Vaccine Marketplace   Shipments   More ▾									
Shipment All Shipments ▾ 									
14 items • Sorted by Quantity Shipped • Filtered by All shipment • Updated 3 minutes ago									
<input type="text" value="Search this list..."/>									
	Shipment ID ▾	Quantity... ▾ ▾	Quantity R... ▾	NDC ▾	Manufacturer ▾	Lot Number ▾	Created Date ▾	Shipment Tracking ... ▾	Delivery Number ▾
1	SHIP-0000004	197	200	78978-7878-89	Moderna	U6828AA	12/4/2020, 6:14 PM	30001	101
2	SHIP-0000013	140	150	59267-1000-01	Pfizer	564645	12/5/2020, 12:26 AM	67867886	12345654
3	SHIP-0000002	100	100	59267-1000-01	Pfizer	U6828AB	12/4/2020, 4:28 PM	34354545455	123123123

## Audience

Healthcare  
Location  
Manager

## Tips

You can use the SEARCHBAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.

# Step 4 of 4: Navigate to the Shipment Details

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

SHIP-0004228

DETAILS

RELATED

Information

Shipment ID  
SHIP-0004228

Order  
ORD-0004057

Order Product  
0000003758

Date Shipped (MM/DD/YYYY)  
9//21/02/1

Account  
Solutions Loc1

Status  
Shipped

Primary Coordinator Email

Email Sent to Primary Location Coord  
☒

VTcks Shipping File

Delivery Number  
007+16

Delivery Line Number  
7

Date Shipped  
02/19/21

Quantity Requested  
1,000

Lot Number  
111111

Lot Expiration Date  
12/31/21

On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Date Shipped
- Quantity Shipped
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer

1. On the Shipment record, click on the **DETAILS TAB**

## Audience

Healthcare  
Location  
Manager

## Tips

Review specific details about your order.

# Add New Vaccine Inventory



# Step 1 of 7: Navigate to the Vaccine Inventory tab

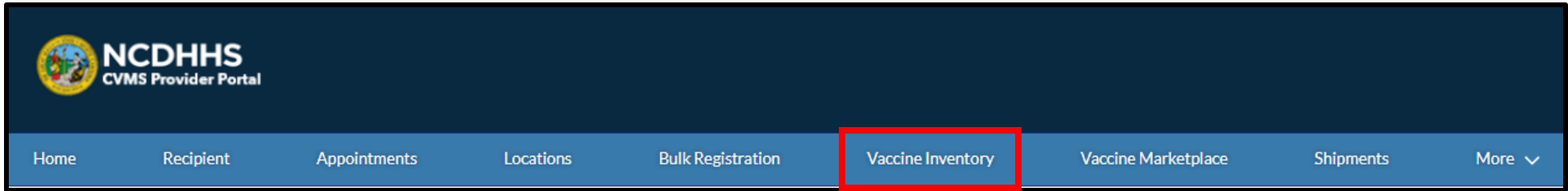
When you **PHYSICALLY RECEIVE** a COVID-19 vaccine inventory shipment for any COVID-19 vaccine type, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

*This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers or redistributions. Please see the Receiving a COVID-19 Vaccine Transfer / Redistribution section for steps on how to process inbound transfers or redistributions.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

## Audience

Healthcare  
Location  
Manager



# Step 2 of 7: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the **CVMS PROVIDER PORTAL INVENTORY DEPRECATION, TRANSFER, AND REDISTRIBUTION USER GUIDE** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) to learn more about COVID-19 vaccine Wastage, Insufficient Quantities, and Redistribution / Transfer processes.

- 1. Click **ADD**
- 2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**

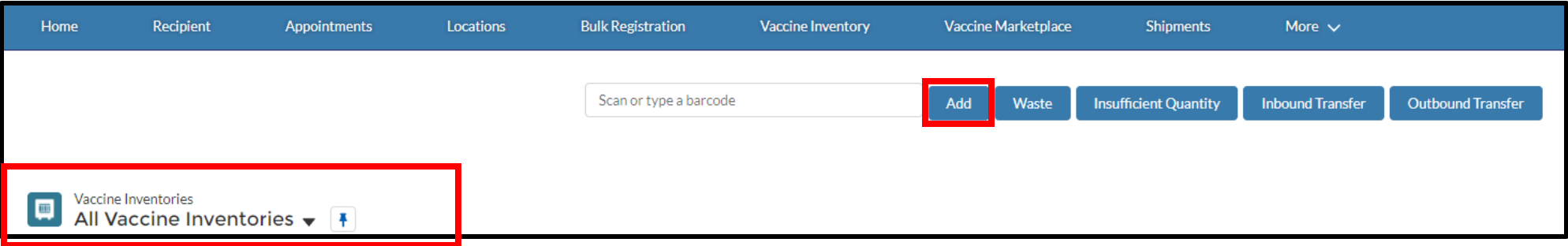
## Audience

Healthcare  
Location  
Manager

## Tips

By Default, the view is set as “Recently Viewed”, therefore the list will seem empty at first.

Change the view to “All Vaccine Inventories” and click the THUMBNAIL icon to PIN your favorite list view.



## Step 3 of 7: Enter Vaccine Inventory Information

New Vaccine Inventory: New Vaccine

Reminder(s)

Moderna Instructions  
Moderna can now be shipped in 10 doses/vial (NDC: 80777-273-99) or 14 doses/vial packaging (NDC: 80777-273-98). Please ensure you select the correct Moderna 'Vaccine Product'.

**Fields**

* Account ⓘ Search Accounts... 🔍	* Vaccine Inventory Name Delivery 08/25/2021
* Expiration Date Date Time [Date Picker] [Time Picker]	Date Received Date Time 8/25/2021 3:05 PM
* Vaccine Product Search Vaccine Products... 🔍	* Total Doses ⓘ [Text Field]
* Lot [Text Field]	Extra Doses ⓘ [Text Field]
	State Sponsored Contract ⓘ <input type="checkbox"/>

**Shipment Details**

Shipment [Text Field] Unable to locate Shipment record ⓘ

Cancel Save & New Save

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS**.

### 1. Populate all required **VACCINE INVENTORY FIELDS**

- Account (Do not create a new Account)
- Vaccine Inventory Name (*editable*)
- Expiration Date
- Date and Time Received
- Vaccine Product
- Total Doses
- Lot #
- State Sponsored Contract

### 2. Continue to **SHIPMENT DETAILS**

#### Audience

Healthcare  
Location  
Manager

#### Tips

When adding Inventory into CVMS, we recommend including the Lot #'s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from **DIFFERENT LOT NUMBERS** must be entered as separate Inventory records.

*For more information on Extra Doses, see page 20, 'Entering Extra Doses'.*

## Step 4 of 7: Enter Shipment Details

New Vaccine Inventory: New Vaccine

Fields

\* Account ⓘ  
Search Accounts... 🔍

\* Vaccine Inventory Name  
Delivery 03/02/2021

\* Expiration Date  
Date Time  
3/2/2021 11:05 AM

\* Vaccine Product  
Search Vaccine Products... 🔍

\* Lot

\* Total Doses ⓘ

\* Extra Doses ⓘ

Shipment Details

Shipment  
Search Shipment... 🔍

Unable to locate Shipment record ⓘ  
☐

Inventory Instructions and Assistance

Extra Dose Instructions  
Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

Inventory Creation Instructions  
Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:  
[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

System Information

Cancel Save & New Save

You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECIATION**.

1. Select a **SHIPMENT RECORD**
2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box
3. Before saving, **REVIEW** all entered details
4. Click **SAVE**

### Audience

Healthcare  
Location  
Manager

### Tips

You may click SAVE & NEW to process / add additional Vaccine Inventory records.

Vaccine Pfizer products Ordered on or after January 26 should be logged as the 6 doses/vial Pfizer product (not 5) so that inventory is being tracked per more recent guidance from the CDC. Vaccine Pfizer products Ordered before January 26 should be logged as the 5 doses/vial Pfizer product.

## Step 5 of 7: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

*Note: The CDC has directed that the Pfizer 6 dose vials should never have an extra dose.*

The screenshot shows a web form titled "New Vaccine Inventory: New Vaccine". It contains several sections: "Reminder(s)" with Moderna instructions, "Fields" with input fields for Account, Vaccine Inventory Name, Expiration Date, Date Received, Vaccine Product, Total Doses, and Lot, and "Shipment Details" with a Shipment field. The "Extra Doses" field, located under "Total Doses", is highlighted with a red rectangle. The form also includes "Cancel", "Save & New", and "Save" buttons at the bottom.

### Audience

Healthcare  
Location  
Manager

### Tips

The Extra Doses field is editable at time of Vaccine Inventory record creation and up until the last dose is administered.

It is recommended that you enter extra doses as they happen instead of at the time of record creation.

### Inventory Instructions and Assistance

#### Extra Dose Instructions

Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

#### Inventory Creation Instructions

Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:

[https://ncgov.servicenow.services.com/csm\\_vaccine](https://ncgov.servicenow.services.com/csm_vaccine)

# Step 6 of 7: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Vaccine Inventory

Delivery 02/12/2021

Request Transfer/Redistribution

Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
<a href="#">Clinic ABC Loc 1</a>	20		20	0	0

DETAILS

RELATED

Vaccine Inventory Details

Vaccine Product

[Moderna \(10 MDV\) COVID-19 Vaccine](#)

Lot

34

Expiration Date (MM/DD/YYYY)

2/12/2021, 12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

2

Vaccine Inventory Name

Delivery 02/12/2021

Account

[Clinic ABC Loc 1](#)

Date and Time Received (MM/DD/YYYY)

2/12/2021, 8:18 AM

Status

Available

Federal Allocation?


☐

## Audience

Healthcare  
Location  
Manager

## Tips

Review the Highlight Panel at the top of the Vaccine Inventory Record.

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

21

# Step 7 of 7: Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click **ALL VACCINE INVENTORIES**
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

## Audience

Healthcare  
Location  
Manager

## Tips

Click the THUMBNAIL icon to PIN your favorite list view.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

1 item • Updated a few seconds ago

Vaccine Inventory ...

Product

1

Delivery02/12/2021

Moderna

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

1 item •

LIST VIEWS

All Vaccine Inventories

Doses Lost In Transit

Inbound Transfers

Outbound Transfers

Recently Viewed (Pinned list)

Search this list...

ose...

Expiration Date (M...

Date and Time Re...

Usage (First or Seco...

Account Name

0

2/12/2021, 12:00 PM

2/12/2021, 8:18 AM

First Dose only (100%)

Clinic ABC Loc 1



# Special attention to the Pfizer 6-dose vial control

Due to the nature of the Pfizer 6-dose vial, extra doses are not allowed by the CDC. Though CVMS will still allow you to enter an extra dose for any vaccine inventory, you will receive a yellow traffic light visual alert for any Pfizer 6-dose product inventories if you attempt to add extra doses.

▼ Vaccine Inventory Details

Vaccine Product

Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine

Lot

pf10000

Expiration Date

5/31/2021, 12:00 PM

Total Vials ⓘ

1,667

Pfizer 6 Dose Vial 'Extra Doses' Warning ⓘ

▼ Dose Amounts

Total Doses ⓘ

10,000

Extra Doses ⓘ

Doses Available ⓘ

9,998

▼ Vaccine Inventory Details

Vaccine Product

Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine

Lot

pf10000

Expiration Date

5/31/2021, 12:00 PM

Total Vials ⓘ

1,667

Pfizer 6 Dose Vial 'Extra Doses' Warning ⓘ

▼ Dose Amounts

Total Doses ⓘ

10,000

Extra Doses ⓘ

1

Doses Available ⓘ

9,999

## Audience

Healthcare  
Location  
Manager

## Tips

If extra doses were previously annotated, do not try to remove them. All extra doses and wastage events should be entered at the time of the event.

# **Declare Availability for More Allocations by the State**

# Step 1 of 2: Navigate to the Account Record (Location)

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you **UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK** if you want your adjustment to be considered for vaccine allocation planning.

If you indicate **YES**, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate **NO** because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

- 1. From the Account Management tab, click the **ACCOUNT NAME (LOCATION)**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Search

Reset

Name	Email	Title	NCID	Direct Account Name	Profile	Active
Steve DiGangi	steven.j.digangi_acn@dhhs.nc....		sdigangi_hcp_lm	TestLoc_UAT1	Healthcare Location Mgr	Yes
Steve DiGangi	steven.j.digangi@accenture.c...		sdigangi_training	TestLoc_UAT1	Healthcare Provider - Read O...	Yes
Darrell Lee	darrell.e.lee@accenture.com		dlee20	TestLoc_UAT1	Healthcare Location Mgr	Yes
Jim Readonly	jimreadonly@mailinator.com		jimreadonly	TestLoc_UAT1		

## Audience

Healthcare  
Location  
Manager

## Tips

If you have multiple locations, make sure to update each location's Allocation Availability each week as appropriate.

You can also get to the Account Record (Location) from the Vaccine Inventory tab and clicking on the Account Name (Location) field from any row of vaccine inventory records.

# Step 2 of 2: Update Your Location's Availability to Receive COVID-19 Vaccine Inventory

From your Account (Location) Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK**. It will remain the same as the last updated value until you change it.

Your location's **ALLOCATION AVAILABILITY STATUS** is defaulted to **YES** upon registration.

- 1. From the Account Record (Location), click the **CHANGE ALLOCATION AVAILABILITY** button
- 2. Select **YES** or **NO** from the drop-down menu
- 3. Click **SAVE**

## Audience

Healthcare  
Location  
Manager

## Tips

Once you select Yes or No for a location, this selection will remain until you change it.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Account Solutions Hospital

Change Allocation Availability

Available to Receive Vaccine Allocation

Instructions (Available to Receive Vacs)

Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the site moves it to 'Yes.')

Change Allocation Availability

\* Available to Receive Vaccine Allocation

Yes

Instructions (Available to Receive Vacs)

Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the site moves it to 'Yes.')

Cancel

Save

# Exchanging Vaccines Through the Vaccine Marketplace

# What is the Vaccine Marketplace?

The “Vaccine Marketplace” enables providers to self-identify and match COVID-19 vaccine needs with other providers; this feature supports the transfer of COVID-19 vaccine from **provider to provider**.

## SUPPLY

**Providers with extra COVID-19 vaccine doses can:**

- Search the Vaccine Marketplace for a nearby provider in need of extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, marketplace post of extra dose availability can be created

## DEMAND

**Providers seeking extra COVID-19 vaccine doses can:**

- Search the Vaccine Marketplace for a nearby provider offering extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, marketplace post with quantity and vaccine brand needed can be created

**Once providers reach an agreement on moving COVID-19 vaccine doses, the existing transfer process in the CVMS Provider Portal is followed to complete the transaction.**

# What is a Hub?

Providers can also send extra doses to a Hub and obtain new doses from a Hub.

## What is a Hub?

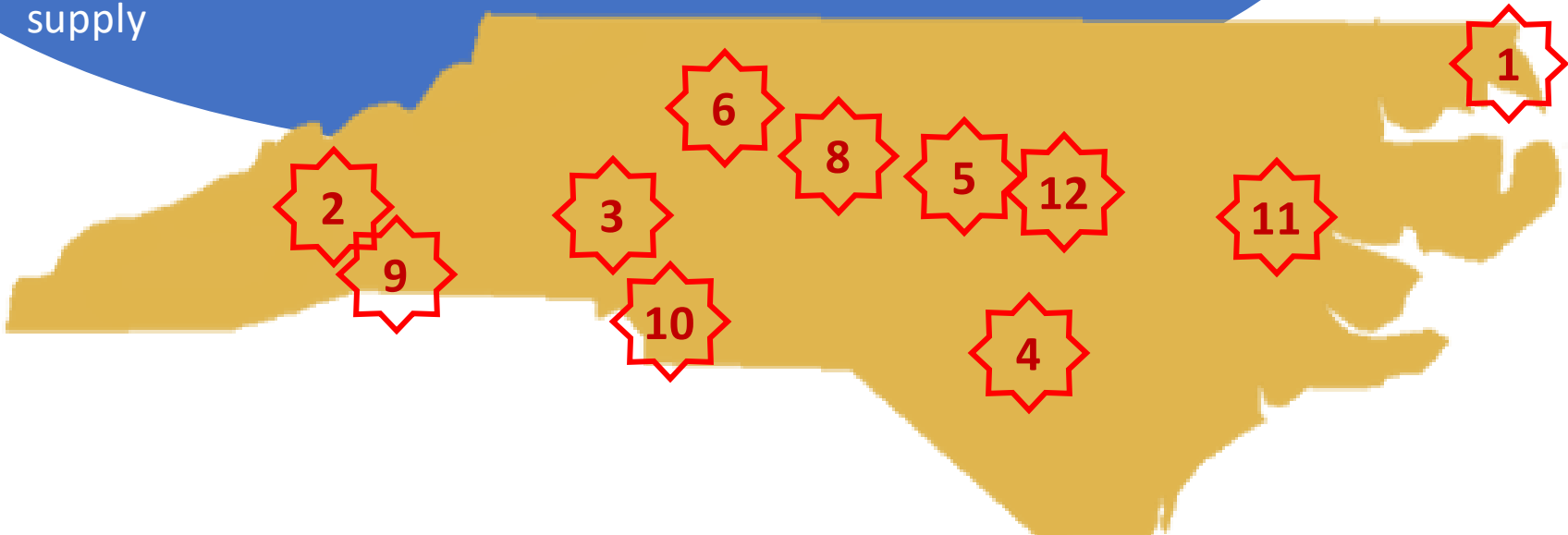
- Hubs are locations contracted by NCDHHS to serve as COVID-19 **vaccine repositories**. Hubs consolidate vaccine inventories that are dispersed among multiple providers.
- These designated Hubs are also able to deliver and/or facilitate COVID-19 vaccine pickups if a transfer is requested.

### Which hub should you contact?

- Contact your assigned Hub (see [“Find your associated Hub”](#) in this document), or the Hub closest to your location
- Filter the Vaccine Marketplace on your Hub to check their supply

Hub 1	Currituck County Health Department	Currituck
Hub 2	Buncombe County Health and Human Services	Buncombe
Hub 3	Catawba County Public Health	Catawba
Hub 4	Cumberland County Health Department	Cumberland
Hub 5	Durham County Health Department	Durham
Hub 6	Forsyth County Health Department	Forsyth
Hub 8	Moses H. Cone Memorial Hospital	Guilford
Hub 9	Henderson County Health Department	Henderson
Hub 10	StarMed Family & Urgent Care - Freemore	Freemore
Hub 11	Vidant Medical Center	Pitt
Hub 12	Wake County Human Services	Wake

\*There is currently no Hub 7.





# Search and Post Request in the Vaccine Marketplace

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All

164 items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated a few seconds ago


Search this list...

	Order ...	Request ...	Status	St...	Account ...	County	City	Product	Br...	Dose...	Hub?	Pri...	Created ...	Last Mod...	
90	<input type="checkbox"/> ORD-00...	Extra (to ...	Active		DoNotUs...	Alexander	vik	Modern...		20	Yes(Hub 1)		6/11/20...	6/11/20...	
91	<input type="checkbox"/> ORD-00...	Wanted (...	Closed/I...		RPA Loc 1			Moderna		1,400			6/11/20...	6/11/20...	
92	<input type="checkbox"/> ORD-00...	Extra (to ...	Auto-Lap...		RPA Loc 1			Modern...		14			6/11/20...	6/18/20...	
93	<input type="checkbox"/> ORD-00...	Wanted (...	Auto-Lap...		RPA Loc 1			Moderna		1,400			6/11/20...	6/18/20...	

All Users with a Healthcare Location Manager Profile have access to the Vaccine Marketplace via the **Vaccine Marketplace tab**.

You can **search** other providers in your area with extra inventory ready to transfer out **OR** providers near you seeking inventory by COVID-19 vaccine product.

**Hubs** will also use the Vaccine Marketplace to list the Extra Doses they have at hand.



NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

30

# Find your Associated Hub


# Step 1 of 3: Find Your Account Record

The NCDHHS team will assign COVID-19 vaccine providers to the different Hubs around the State. If you have doubts on the Hub assigned to your location, follow these instructions.

- 1. Navigate to the **LOCATIONS** tab

## Audience

Healthcare  
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as RPA Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

# Step 2 of 3: Open your Location Account Record

- 1. Click on the **ACCOUNT NAME** (not on the Location Name)

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

NewEnable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date
Walmart Store- UAT - Do Not Use	TestLoc_UAT1	3633 Clemmons Rd, Clemmons, North Carolina 27012-8725 336-293-1395		
Pop-Up Clinic	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 111-111-1111		
Training Team Vaccine Provider - Site 2	Training Team Vaccine Provider - Site 2	1 fayetteville street, Raleigh, North Carolina 27601 123456789		

## Audience

Healthcare  
Location Manager

# Step 3 of 3: Find the Primary Hub Associated to Your Location

- 1. Select the **DETAILS** tab
- 2. Scroll to the bottom to view **HUB INFORMATION**
- 3. The Hub allocated to your location will appear under **PRIMARY HUB ASSOCIATED TO THIS LOCATION**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Account  
TestLoc\_UAT1

Bulk Employee UploadChange Allocation Availability

Available to Receive Vaccine Allocation

Instructions (Available to Receive Vacs)  
Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the next Monday 10am).

DETAILS

RELATED

Hub Information (for Vaccine Marketplace & Transfers)

Hub

Primary Hub Associated to this Location  
Hub 1 (Currituck)

DHHS Liaison (Hub)

Transport: Pickup, Deliver, or Both?

Coverage Type (Hub)

Notes (Hub)

## Audience

Healthcare  
Location Manager

## Tips

If your location is currently not assigned to a Hub, the field will be either empty or filled with **INDETERMINED**. If it is the case, feel free to contact the Hub of your choice to confirm if they can support you.

# Accessing the Missing and Undetermined Hubs Report

The Missing and Undetermined Hubs Report displays hub information for all accounts that are not associated with a Vaccine Marketplace Hub.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **MISSING & UNDETERMINED HUBS REPORT**

## Audience

Healthcare  
Location  
Manager

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal>.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

ReportsAll Reports10 items

REPORTSRecentCreated by MePrivate ReportsAll Reports

FOLDERSAll FoldersCreated by Me

Report Name	Description	Folder	Created By	Created On
Marketplace Inquiries	All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'	Provider Reports	Copado Integration User	7/16/2021, 2:38 AM
Missing & Undetermined Hubs	Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned	Vaccine Marketplace Reports	Copado Integration User	7/19/2021, 5:44 PM
Recipient Vaccination Report	This report shows the completed vaccine administration details for the current logged in user's location(s).	Provider Reports	George Jaramillo	1/31/2021, 11:08 PM

# Accessing the Missing and Undetermined Hubs Report (Continued)

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Report: Accounts

Missing & Undetermined Hubs

Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned

Search

Add Chart

Filter

Refresh

Export

Total Records

1

	Description	Account Name	Primary Hub Associated to this Location	Provider PIN	Vaccine Administration County	Vaccine Shipping County	Parent Account	COVID-19 Vaccination
1	-	Training Team Vaccine Provider - Site 2	-	123457	Wake	Wake	Training Team Vaccine Provider	Medical practice : fami



# **Offer your Vaccine Surplus**


# Step 1 of 13: Navigate to the Vaccine Marketplace

If you have a surplus of COVID-19 vaccine doses, first contact your assigned Hub to check if they can collect them from you. If not, check if other providers in your area are looking for COVID-19 vaccine doses. If you don't find any, you can post a request on your own in the Vaccine Marketplace.

Audience

Healthcare  
Location Manager

1. At the top of your home page, click on the **VACCINE MARKETPLACE**



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as RPA Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

# Step 2 of 13: View All Available And Active Requests

1. Locate **ORDERS** and click on the drop-down menu to change the view

HomeRecipientsAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All

164 items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated 8 minutes ago

Search this list...

Settings

Grid

Refresh

Edit

Print

Filter

Order ...

Request ...

Status

St...

Account ...

County

City

Product

Br...

Dose...

Hub?

Pri...

Created ...

Last Mod...

2. Select **SEEK TRANSFER MATCH – WANTED (Active)**

Orders

Seek Transfer Match - Wanted (Active)

1 item • Sorted by Order Number • Filtered by All

orders - Updated

Search

Seek Transfer Match - All (Active)

Seek Transfer Match - Extra (Active)

✓ Seek Transfer Match - Wanted (Active)


ALL OTHER LISTS


## Audience

Healthcare  
Location Manager

## Tips

You can set the view to display active records associated with your hub. It is recommended that you search first by Hub. However, this will only show active records. If you are unable to find an appropriate match, it is best to search all matches.

To always see the available and active requests, set the view to **SEEK TRANSFER MATCH – ALL**, and use the pin icon  to set this as your default view.



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HUMAN SERVICES

39

# Step 3 of 13: Sort Inventories by Location

To find a provider near your location, sort the inventories by location.

- 1. Click on the Header Row fields **CITY**, **COUNTY**, or **HUB?** to sort the records in ascending or descending order by location

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All

164 items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated 11 minutes ago

Order ...

Request ...

Status

St...

Account ...

County

City

Product

Br...

Dose...

Hub?

Pri...

Created ...

Last Mod...

## Audience

Healthcare  
Location Manager

## Tips

You can sort records associated with specific Hubs by using the ascending/descending arrow next to **HUB**. Unlike the view discussed on the previous page, this will display all records associated with each specific Hub rather than just the active matches.

NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

40

# Step 4 of 13: Select the Request that Match Your Offer

After sorting your results, navigate the list to find the inventory request that appears to best match the surplus inventory you have to offer.

- 1. Click on the **ORDER NUMBER** associated with the request

## Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All

50+ items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Order ...	Request ...	Status	St...	Account ...	County	City	Product	Br...	Dose...	Hub?	Pri...	Created ...	Last Mod...	
90	<input type="checkbox"/> ORD-001...	Wanted (t...	Active		DoNotUs...	Yadkin	Iceland	Pfizer-Bi...		0			7/15/202...	7/15/202...	
91	<input type="checkbox"/> ORD-001...	Extra (to ...	Active		DoNotUs...	Yadkin	Iceland	TestVacci...		90			7/15/202...	7/15/202...	
92	<input type="checkbox"/> ORD-001...	Wanted (t...	Active		DoNotUs...	Yadkin	Iceland	Pfizer-Bi...		0			7/15/202...	7/15/202...	
93	<input type="checkbox"/> ORD-001...	Extra (to ...	Active		DoNotUs...	Yadkin	Iceland	TestVacci...		90			7/15/202...	7/15/202...	
94	<input type="checkbox"/> ORD-001...	Extra (to ...	Active		DoNotUs...	Yadkin	Iceland	TestVacci...		90			7/15/202...	7/15/202...	
95	<input type="checkbox"/> ORD-001...	Extra (to ...	Closed/In...		DoNotUs...	Alexander	Vik, Iceland	Moderna ...		10	Yes(Hub 1)		6/2/2021...	6/4/2021...	
96	<input type="checkbox"/> ORD-001...	Extra (to ...	Closed/In...		DoNotUs...	Alexander	Vik, Iceland	Moderna ...		10	Yes(Hub 1)		6/2/2021...	6/7/2021...	

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HEALTH AND  
HUMAN SERVICES

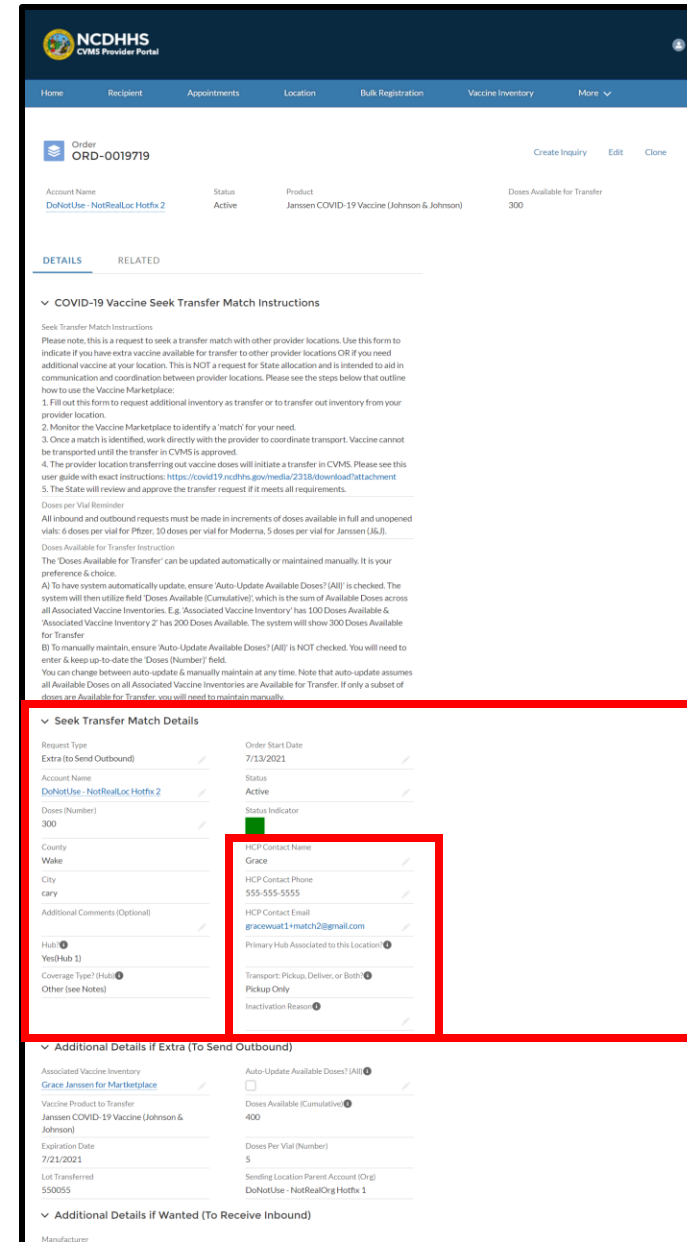
41

# Step 5 of 13: Review the Inventory Details

Review the inventory details, and contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL**.

If an agreement is reached to transfer COVID-19 vaccine doses, you can **initiate an Outbound Transfer** ([Click here to read the instructions on the Outbound Transfer Process located in this user guide](#)).

Please also check the NCDHHS guidance for transport of COVID-19 vaccine at <https://covid19.ncdhhs.gov/media/3070/download?attachment>



**NCDHHS CVMS Provider Portal**

Home Recipient Appointments Location Bulk Registration Vaccine Inventory More

Order ORD-0019719 Create Inquiry Edit Clone

Account Name: DoNotUse - NotRealLoc Hotfix 2 Status: Active Product: Janssen COVID-19 Vaccine (Johnson & Johnson) Doses Available for Transfer: 300

**DETAILS** RELATED

**COVID-19 Vaccine Seek Transfer Match Instructions**

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

- Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
- Monitor the Vaccine Marketplace to identify a 'match' for your need.
- Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
- The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
- The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses?' (All) is checked. The system will then utilize field 'Doses Available (Cumulative)', which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer


B) To manually maintain, ensure 'Auto-Update Available Doses?' (All) is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

**Seek Transfer Match Details**

Request Type: Extra (To Send Outbound) ✓ Order Start Date: 7/13/2021 ✓


Account Name: DoNotUse - NotRealLoc Hotfix 2 ✓ Status: Active ✓


Doses (Number): 300 ✓ Status Indicator: 

County: Wake ✓

City: Cary ✓

Additional Comments (Optional): ✓


Hub:  Yes (Hub 1) ✓


Coverage Type? (Hub):  Other (see Notes) ✓


HCP Contact Name: Grace ✓

HCP Contact Phone: 555-555-5555 ✓

HCP Contact Email: graceuat1+match2@gmail.com ✓

Primary Hub Associated to this Location:  ✓

Transport: Pickup, Deliver, or Both:  Pickup Only ✓

Inactivation Reason:  Inactivation Reason 1 ✓

**Additional Details if Extra (To Send Outbound)**

Associated Vaccine Inventory: Grace Janssen for Marketplace ✓

Vaccine Product to Transfer: Janssen COVID-19 Vaccine (Johnson & Johnson) ✓

Expiration Date: 7/23/2021 ✓

Lot Transferred: 550055 ✓


Auto-Update Available Doses? (All): ☐ ✓

Doses Available (Cumulative): 400 ✓

Doses Per Vial (Number): 5 ✓

Sending Location Parent Account (Org): DoNotUse - NotRealOrg Hotfix 1 ✓

**Additional Details if Wanted (To Receive Inbound)**

Manufacturer: 

Audience

Healthcare  
Location Manager

# Step 6 of 13: Initiate a New Seek Transfer Match

If no provider is looking for the type of COVID-19 vaccine product you are offering, post an extra dose availability in the Vaccine Marketplace to let other providers know that you can support them.

- 1. Navigate to the **VACCINE MARKETPLACE** tab
- 2. Click on **NEW SEEK TRANSFER MATCH**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All (Active)

6 items • Sorted by Order Number • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Edit

Print

Filter


	<input type="checkbox"/>	Order Nu...	Request Type	Account Name	County	City	Product	Br...	Doses Av...	Expiration...	Hub?	Primary ...	Created Date	La
1	<input type="checkbox"/>	ORD-0017354	Extra (to Send ...	DoNotUse - QA...	Alexand...	vik	Moderna (14 d...	moderna	20	6/15/2021	Yes(Hub 1)		6/11/2021, 12:...	6/
2	<input type="checkbox"/>	ORD-0017361	Extra (to Send ...	DoNotUse - QA...	Alexand...	vik	Moderna (14 d...	moderna	20	6/15/2021	Yes(Hub 1)		6/14/2021, 11:...	6/
3	<input type="checkbox"/>	ORD-0017445	Extra (to Send ...	DoNotUse - QA...	Alexand...	vik	Moderna (10 d...	moderna	2	6/30/2021	Yes(Hub 1)		6/28/2021, 2:0...	6/

## Audience

Healthcare  
Location Manager

## Tips

Before placing a Seek Transfer Match, it is recommended that you contact your associated Hub to discuss your needs.

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

43

# Step 7 of 13: Start completing the “Seek Transfer Match” Form

New Order: Seek Transfer Match

**COVID-19 Vaccine Seek Transfer Match Instructions**

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

**Seek Transfer Match Details**

\* Request Type  
Extra (to Send Outbound)

\* Order Start Date  
6/9/2021

\* Account Name  
Training Team Vaccine Provider - Site 1

\* Status  
Active

\* Doses (Number)  
400

\* HCP Contact Name  
Peter Pan

\* HCP Contact Phone  
111-222-3333

Additional Comments (Optional)  
There are 2 different lots available:  
300 doses expiring in July 15, 2021 // 100 doses expiring in November 30, 2021

1. Read the instructions at the top of window
2. Complete the required fields:
  - **Request Type:** select “Extra (to Send Outbound)”
  - **Order Start Date:** enter today’s date
  - **Account Name:** select your location account name
  - **Status:** select **ACTIVE**
  - **Doses:** enter the number of doses you are offering
  - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
  - **Additional Comments:** be as detailed as possible. For example, “These Extra doses of 400 doses are split over six separate inventories. Here are the number of doses per lot and expiration date: xxx – xx/xxxx”

## Audience

Healthcare  
Location Manager



## Step 8 of 13: Select the Associated Inventory

New Order: Seek Transfer

Checked will copy "Available Doses (Cumulative)" into this field, which is the sum of Doses Available across all Associated Vaccine Inventories. Leaving unchecked means you will manually keep this number up-to-date via the "Doses (Number)" field.

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

111111 Delivery 06/23/2021

Auto-Update Available Doses? (All)

Manufacturer

--None--

Requesting Provider to check box below to confirm adherence to each requirement:

Adherence to all Requirements

Requirement 1 (Seek Transfer Match)

Please confirm you have read and reviewed the latest CDC Shipping and Handling guidance for vaccine transport: <https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf>

Requirement 2 (Seek Transfer Match)

All transfer matches will be provider initiated and led. Providers will be responsible for documenting the transfer in CVMS and coordinating the physical transport of the vaccine. The State will not be available to support any physical transport of vaccine in a transfer match request made through the Vaccine Marketplace as DHHS is not monitoring this forum for requests for State support. Providers in need of vaccine who are unable to secure doses following the conditions outlined within the Vaccine Marketplace will need to submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

Cancel Save & New Save

1. Scroll down and complete the bottom of the form:
  - **Associated Vaccine Inventory:** select the lot number you are offering. See previous slide if you wish to submit multiple inventories of the same brand
  - **Auto-update Available Doses? (All):** (OPTIONAL) select this box if you would like to automatically update the available doses in the match based on doses available reflected in CVMS
  - **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

### Audience

Healthcare  
Location Manager

### Tips

Auto-updating available doses is optional. If you choose this option, the match will automatically update the available doses of your listing to reflect what is within CVMS. This can be especially helpful if you link multiple inventories to a single match, particularly if part of the inventory is used before the match is closed.

# Step 9 of 13: Submit the “Seek Transfer Match” Form

New Order: Seek Transfer Match

Additional Details if Extra & Doses across multiple Vaccine Inventories

Associated Vaccine Inventory 2 ⓘ  
Search Vaccine Inventories...

Associated Vaccine Inventory 3 ⓘ  
Search Vaccine Inventories...

Associated Vaccine Inventory 4 ⓘ  
Search Vaccine Inventories...

Associated Vaccine Inventory 5 ⓘ  
Search Vaccine Inventories...

Associated Vaccine Inventory 6 ⓘ  
Search Vaccine Inventories...

Associated Vaccine Inventory 7 ⓘ  
Search Vaccine Inventories...

Associated Vaccine Inventory 8 ⓘ  
Search Vaccine Inventories...

System Information

Order Record Type  
Seek Transfer Match

Order Owner  
Darrell Lee

Cancel

Save & New

Save

- 1. Enter any additional associated inventories (if an Extra Seek Transfer Match)
- 2. Click **SAVE**

## Audience


Healthcare  
Location Manager

## Tips

So long as the inventories are from the same lot, you can combine inventories to create a single Extra Seek Transfer Match instead of having to create multiple matches.

# Step 10 of 13: Receive an Inquiry from Another Provider

Sandbox: COVID-19 Vaccine Marketplace Inquiry

 NC CVMS <nccvms@dhhs.nc.gov>  
To Digangi, Steve


↩

↶

→

...

7:21 PM



NCDHHS  
COVID-19 Response

NC Department of Health and Human Services

Hello Steve,

Please see below for details of a Marketplace Inquiry from another Account regarding one of your COVID-19 Vaccine Marketplace 'Seek Transfer Match' requests.

Request Details:

- Requesting Account Name: DoNotUse-NotReaLoc Hotfix 1
- Created Date: 7/15/2021
- Inquiry ID: MKTINQ-0083
- Doses: 50
- Manufacturer: Moderna (14 doses/vial) COVID-19 Vaccine
- Lot: 19128
- Contact Name: Bill
- Contact Number: 444-555-6666
- Contact Email: [billy@mailinator.com](mailto:billy@mailinator.com)
- Transportation Request: Receiving Location to Pickup
- Address: Road  
Vik, North Carolina 00000  
County: Unknown
- Additional Details:
- Status: Open
- Requested from Account: DoNotUse-NotReaLoc Hotfix 1
- Hub (Requested from Account): Hub 1
- Hub (Requesting Account): Hub 1

Need support? Submit your question to the help desk here: [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

Thank you, NC Department of Health and Human Services

Division of Public Health

If another provider is interested in the COVID-19 vaccines that you are offering, you might receive an email with the details of their need, their address, and other information.

This e-mail is the result of a provider inquiry in CVMS.

## Audience

Healthcare  
Location Manager

# Step 11 of 13: View the Inquiry in CVMS

You can see all the inquiries you received on a listing. To do so,

- 1. Open the listing record in the **VACCINE MARKETPLACE**
- 2. Click on the **RELATED** tab
- 3. View the list of Marketplace Inquiries
- 4. Open them by clicking on the Marketplace Inquiry Name Link

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

OrderORD-0019684

Create InquiryEditClone

Account NameDoNotUse-NotReaLoc Hotfix 1

StatusActive

ProductModerna (14 doses/vial) COVID-19 Vaccine

Doses Available for Transfer1,000

Auto-Update Available Doses? (All)☐

Order Start Date7/1/2021

DETAILS

RELATED

Marketplace Inquiries (6+)

Marketplace Inquiry Name	Status	Requesting Account	Doses Requested
<a href="#">MKTINQ-0000</a>	Open	<a href="#">TestLoc-DoNotUse2</a>	12,345
<a href="#">MKTINQ-0003</a>		<a href="#">TestLoc1-DoNotUse</a>	50
<a href="#">MKTINQ-0004</a>	Open	<a href="#">712PE</a>	10
<a href="#">MKTINQ-0006</a>	Open	<a href="#">TestLoc-DoNotUse2</a>	100
<a href="#">MKTINQ-0007</a>	Open		
<a href="#">MKTINQ-0027</a>	Open	<a href="#">DoNotUseVJLoc1_hotfix1</a>	140

New

View All

## Audience

Healthcare  
Location Manager

## Tips

Once you contacted the inquirer, you can **EDIT** the **INQUIRY** and update the status to **COMPLETED** or **REJECTED BY REVIEWER**.

Status

Rejected by Reviewer

--None--

Open

Completed

Cancelled by Requestor

☒ Rejected by Reviewer

test.123@plubj.com

Transfer Warning

Save

# Step 12 of 13: Close Your Listing

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note this is a request to seek a transfer match with other provider locations. Please use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and the State will not be regularly viewing these. It is intended to aid in communication between provider locations.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

\* Request Type

Extra (to Send Outbound)

\* Account Name

DoNotUse - QALoc1

\* Doses (Number)

10

County

City

\* Order Start Date

5/24/2021

\* Status

Active

--None--

Active

Closed/Inactive

Auto-Lapsed (Old)

Incomplete

111-111-1111

If a local provider contacts you and you are in agreement with the conditions of transfer, you can **initiate an Outbound Transfer** ([Click here for instructions on the transfer in this user guide](#)).

When the transfer has been agreed on, close your Order in the Vaccine Marketplace:

1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on 

Orders


My Seek Transfer Matches
3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

## Audience

Healthcare  
Location Manager

## Tips

Your form will automatically change to an auto-lapsed status after 21 days. To extend, see the section named “[Maintain Your Requests Posted in the Vaccine Marketplace](#)”. The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

49

# Step 13 of 13: Set Inactivation Reason

▼ Seek Transfer Match Details

\*Request Type  
Extra (to Send Outbound)

\*Order Start Date  
7/1/2021

\*Account Name  
DoNotUse-NotReaLoc Hotfix 1

\*Status  
Closed/Inactive

Doses (Number)  
1,000

Country  
Unknown

City  
Vik

Additional Comments (Optional)

Hub? 1  
Yes(Hub 1)

Coverage Type? (Hub) 1  
Regional

\*HCP Contact Name  
Nicole HCP Tester

\*HCP Contact Phone  
800-128-4219

\*HCP Contact Email  
joshuakemp85@gmail.com

Primary Hub Associated to this Location? 1  
Pickup Only

Transport: Pickup, Deliver, or Both? 1  
Pickup Only

Inactivation Reason 1  
--None--  
Completed (single Transfer)  
Completed (multiple Transfers)  
Fulfilled w/o using Marketplace  
Unfulfilled or No longer applicable  
Created in Error  
Auto-Lapsed (Weeks w/o Modification)  
Auto-Lapsed (Expiration Date past)

▼ Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory  
Delivery 06/14/2021

Vaccine Product to Transfer  
Moderna (14 doses/vial) COVID-19 Vaccine

Expiration Date  
8/31/2021

Lot Transferred  
19128

▼ Additional Details if Wanted (To Receive)

Cancel Save

When the seek transfer match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

## Audience

Healthcare  
Location Manager

# Request Additional Vaccines


# Step 1 of 16: Navigate to the Vaccine Marketplace

If you need additional COVID-19 vaccine doses, first check in the Vaccine Marketplace if your assigned Hub can support you. If not, check if other providers in your area are offering extra doses in the Vaccine Marketplace. If you don't find any, you can post a request on your own.

## Audience

Healthcare  
Location Manager

1. At the top of your home page, click on the **VACCINE MARKETPLACE**



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as RPA Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

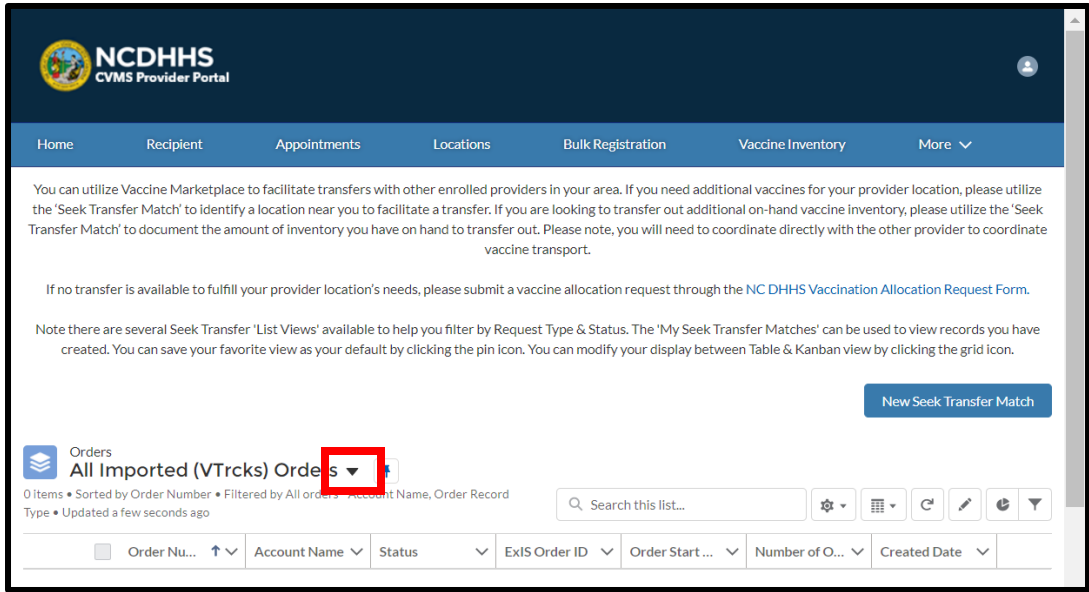
Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

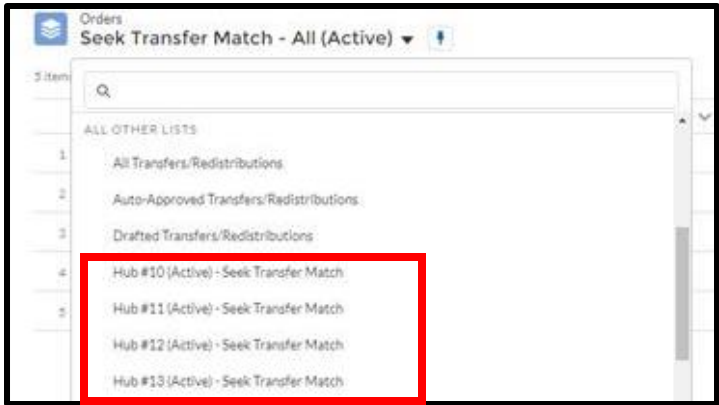


# Step 2 of 16: View All Available And Active Listings Posted By Your Assigned Hub

1. Locate Listings and click on the drop-down menu to change the view




2. Select **HUB#? (ACTIVE) - SEEK TRANSFER MATCH** of your assigned HUB



## Audience

Healthcare  
Location Manager

## Tips

To always see the available and active requests posted by your assigned HUB, set the view to the correct **HUB#? (ACTIVE) - SEEK TRANSFER MATCH** and use the pin icon  to set this as your default view.

# Step 3 of 16: Check if your Assigned Hub is Offering the Vaccine you Seek

After sorting your results, navigate the list to find the inventory that appears to best suit your need.

1. Check the Brands, quantities available, Transport solution proposed by the Hub Location

## Audience

Healthcare  
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Hub #1 (Active) - Seek Transfer Match

4 items • Sorted by Auto-Update Available Doses? (All) • Filtered by All orders - 4 more filters applied • Updated a few seconds ago

Search this list...

	Order N...	Request...	Account Name	Product	Brand	Dos...	Expirati...	HCP Co...	HCP Co...	HCP Contact E...	Transport: P...
1	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - NotRealLoc...	Pfizer...		1,995	7/8/2021	Nicole ...	800-82...	uattests00+hc...	Delivery Only
2	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - QALoc1	TestV...	moderna	994	9/16/2...	fsdfsdfs	703-79...	test@example.c...	Pickup Only
3	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - QALoc1	Mode...	moderna	20	6/15/2...	Seek Ex...	111-11...	ankit.o.srivastav...	Pickup Only
4	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - QALoc1	Mode...	moderna	20	6/15/2...	Seek Ex...	111-11...	ankit.o.srivastav...	Pickup Only

# Step 4 of 16: Sort Inventories by Location

If your Hub offers do not match your need, check listings posted by other providers near your location.

- 1. Filter the Vaccine Marketplace on **SEEK TRANSFER MATCH – EXTRA (Active)**
- 2. Click on the Header Row fields **CITY** or **COUNTY** to sort the records in ascending or descending order by location

## Audience

Healthcare  
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - Extra (Active)

3 items • Sorted by City • Filtered by All orders - Status, Request Type, Order Record Type • Updated a few seconds ago

Order Number

Account Name

Cou...

City

Product

Brand

Dos...

Expiration D...

Created Date

Last Modified D...

Status

Request Type

1

ORD-0017342

Training Team V...

Wake

Raleigh

Pfizer-BioNTech...

300

1/1/2022

6/9/2021, 10:59...

6/9/2021, 10:59...

Acti...

Extra (to Send O...

2

ORD-0017260

DoNotUse - QA...

Moderna (14 do...

10

12/31/2021


6/2/2021, 9:46 ...

6/2/2021, 9:46 ...

Acti...

Extra (to Send O...

# Step 5 of 16: Select the Request that Matches Your Need



NCDHHS  
CVMS Provider Portal

Home

Recipient

Appointments

Locations


Bulk Registration


Vaccine Inventory

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to document the amount of inventory needed and request a transfer from another provider to coordinate vaccine transport.




If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request.

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view all matches. You can modify your display between Table & Kanban view by clicking the icon in the top right corner.

Orders

Seek Transfer Match - Extra (Active) 

3 items • Sorted by City • Filtered by All orders - Status, Request Type, Order Record Type • Updated a few seconds ago

	<input type="checkbox"/> Order Number	Account Name	Cou...	City	Product	Brand	Dos...	Exp...
1	<div><input type="checkbox"/> <b>ORD-0017342</b></div>	Training Team V...	Wake	Raleigh	Pfizer-BioNTech...		300	1/1/...
2	<div><input type="checkbox"/> ORD-0017260</div>	DoNotUse - QA...			Moderna (14 do...		10	12/3...
3	<div><input type="checkbox"/> ORD-0017257</div>	DoNotUse - QA...			Moderna (14 do...		10	12/3...

After sorting your results, navigate the list to find the inventory that appears to best suit your need.

1. Click on the **ORDER NUMBER** associated with the request

## Audience

Healthcare  
Location Manager

Review the listing to see if it matches what you are looking for.

## Healthcare Location Manager




NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**

## Step 7 of 16: Contact the Listing Author


If this listing is offering what you are looking for, you can contact them within the tool. The author of the listing will receive your message by email:

1. From the listing, navigate to the top of the page and click **CREATE INQUIRY**



**NCDHHS**  
 CVMs Provider Portal

Home
Recipient
Appointments
Location
Bulk Registration
Vaccine Inventory
More


Order  
**ORD-0019719**

Create Inquiry

Edit
Clone

Account Name  
DoNotUse - NotRealLoc Hosts 2

Status  
Active

Product  
Janssen COVID-19 Vaccine (Johnson & Johnson)

Doses Available for Transfer  
300

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a match for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMs is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMs. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download/attachment>
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses' (AIU) is checked. The system will then utilize field 'Doses Available (Cumulative)' which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer.

B) To manually maintain, ensure 'Auto-Update Available Doses' (AIU) is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

Vaccine Seek Transfer Match Details

Request Type  
Extra (to Send Outbound)

Order Start Date  
7/13/2021

Account Name  
DoNotUse - NotRealLoc Hosts 2

Status  
Active

Doses (Number)  
300

Status Indicator

County  
Wake

HCP Contact Name  
Grace

City  
cary

HCP Contact Phone  
555-555-5555

Additional Comments (Optional)

HCP Contact Email  
gracewatt1match2@gmail.com

Hub 1  
Yes (Hub 1)

Primary Hub Associated to this Location 1

Coverage Type? (Hub 1)  
Other (see Notes)

Transport: Pickup, Deliver, or Both 1  
Pickup Only

Inactivation Reason 1

Additional Details If Extra (To Send Outbound)

Associated Vaccine Inventory  
[Grace Janssen for Marketplace](#)

Auto-Update Available Doses? (All 1)  
☐

Vaccine Product to Transfer  
Janssen COVID-19 Vaccine (Johnson & Johnson)

Doses Available (Cumulative) 1  
400

Expiration Date  
7/21/2021

Doses Per Vial (Number)  
5

Lot Transferred  
550055

Sending Location Parent Account (Org)  
DoNotUse - NotRealOrg Hosts 1

Additional Details If Wanted (To Receive Inbound)

Manufacturer

## Audience

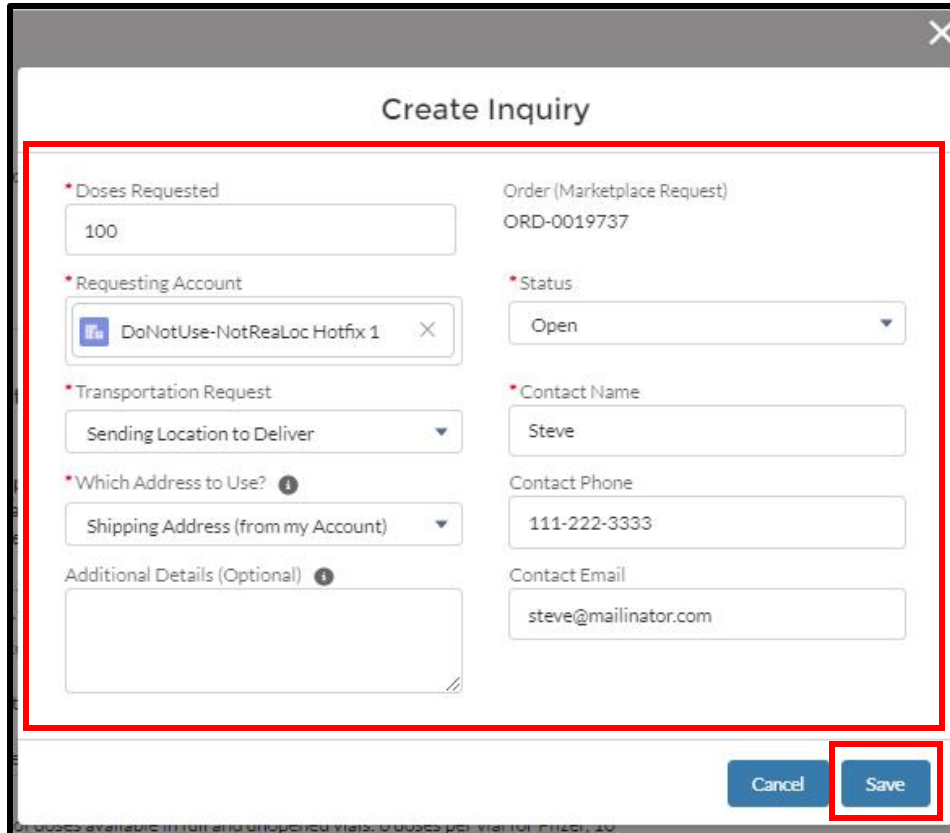
## Healthcare Location Manager

## Tips

It is possible to contact the HCP contact directly with the information provided on the seek transfer match.



## Step 8 of 16: Complete the Inquiry



The screenshot shows a 'Create Inquiry' form with the following fields and values:

- Doses Requested:** 100
- Requesting Account:** DoNotUse-NotReaLoc Hotfix 1
- Transportation Request:** Sending Location to Deliver
- Which Address to Use?:** Shipping Address (from my Account)
- Additional Details (Optional):** (Empty text area)
- Order (Marketplace Request):** ORD-0019737
- Status:** Open
- Contact Name:** Steve
- Contact Phone:** 111-222-3333
- Contact Email:** steve@mailinator.com

At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box.

1. Complete the following fields

- Doses requested
- Requesting Account
- Status (should be set to **OPEN**)
- Transportation Request
- Contact Name
- Address (can either select the address associated with the account or enter another address in the **ADDITIONAL DETAILS**)
- Contact phone (optional)
- Contact e-mail (optional)

2. Click **SAVE**

### Audience

Healthcare  
Location Manager

### Tips

Use the **ADDITIONAL DETAILS** section to fully describe your needs.

# Step 9 of 16: Review the Inquiry

Review your inquiry. Pay special attention to the **TRANSFER WARNING?** box. If checked, CVMS has determined that the inquiry is going to a provider not associated with the same hub as your location. This only serves as a visual warning and will not prevent the inquiry or potential transfer for taking place. If any changes are needed, the inquiry can be edited by clicking **EDIT** in the upper right-hand corner.

## Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Marketplace Inquiry  
MKTINQ-0082

EditCloneNew Note

DETAILSRELATED

Information

Marketplace Inquiry Name  
MKTINQ-0082

Doses Requested  
100

Requesting Account  
DoNotUse-NotRealoc Hotfix 1

Transportation Request  
Sending Location to Deliver

Which Address to Use?  
Shipping Address (from my Account)

Address  
Road  
Vlk, North Carolina 00000  
County: Unknown  
Additional Details (Optional)

Order (Marketplace Request)  
ORD-0019737

Status  
Open

Contact Name  
Steve

Contact Phone  
111-222-3333

Contact Email  
steve@mailinator.com

Transfer Warning?  
☒

Warning Details (System Detected)  
Mismatched Hubs (i.e. Account which created this Inquiry is assigned a different Hub than the Account which created the Seek Transfer Match request)

Additional Details (copied from Order/Marketplace Request)

Requested from Account  
SP\_Loc1

Transport Reqs of Listing Account  
Pickup Only

Vaccine Product  
Moderna (14 doses/vial) COVID-19 Vaccine

System Information

NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

60





# Step 11 of 16: Initiate a New Seek Transfer Match

NCDHHS

CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - Wanted (Active)



2 Items

Sorted by County

Filtered by All orders - Status, Request Type, Order Record Type

Updated a few seconds ago

Search this list...


	Order Number	Account Name	County	City	Manufacturer	Brand	D...	Created Date	Last Modi
1	<input type="checkbox"/> <a href="#">ORD-0017244</a>	<a href="#">DoNotUse - NotRe...</a>	Stokes	Big City	Pfizer-BioNte...		50	6/2/2021, 4:46 A...	6/2/2021,
2	<input type="checkbox"/> <a href="#">ORD-0017341</a>	<a href="#">Training Team Vacci...</a>	Wake	Raleigh	Moderna		100	6/9/2021, 8:54 PM	6/9/2021,

If no provider is offering the type of COVID-19 vaccine product you are seeking, post a **WANTED** request in the Vaccine Marketplace to let other providers know that you can are seeking additional COVID-19 vaccine doses.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Click on **NEW SEEK TRANSFER MATCH**

## Audience

Healthcare  
Location Manager



NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

62

# Step 12 of 16: Start completing the “Seek Transfer Match” Form

## New Order: Seek Transfer Match

### COVID-19 Vaccine Seek Transfer Match Instructions

#### Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
5. The State will review and approve the transfer request if it meets all requirements.

#### Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

### Seek Transfer Match Details

#### \* Request Type

Wanted (to Receive Inbound)

#### \* Order Start Date

6/9/2021

#### \* Account Name

Training Team Vaccine Provider - Sit...

#### \* Status

Active

#### \* Doses (Number)

300

#### \* HCP Contact Name

Ernest Celestine

#### Additional Comments (Optional)

#### \* HCP Contact Phone

111-333-4444

1. Read the instructions at the top of window
2. Complete the required fields:
  - **Request Type:** select “Wanted (to Receive Inbound)”
  - **Order Start Date:** enter today’s date
  - **Account Name:** select your location account name
  - **Status:** select **ACTIVE**
  - **Doses:** enter the number of doses you are looking for
  - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
  - **Additional Comments:** enter any information that could be useful like the address of shipment, and opening hours to receive the shipment

## Audience

Healthcare  
Location Manager

## Step 13 of 16: Submit the “Seek Transfer Match” Form

### New Order: Seek Transfer Match

#### Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

Search Vaccine Inventories...

#### Additional Details if Wanted (To Receive Inbound)

Manufacturer

Janssen (J&J)

Requesting Provider to check box below to confirm adherence to each req...

Adherence to all Requirements



Requirement 1 (Seek Transfer Match)

Please confirm you have read and reviewed the latest CDC Shipping and Handling guidance for vaccine transport: <https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf>

Requirement 2 (Seek Transfer Match)

All transfer matches will be provider initiated and led. Providers will be responsible for documenting the transfer in CVMS and coordinating the physical transport of the vaccine. The State will not be available to support any physical transport of vaccine in a transfer match request made through the Vaccine Marketplace as DHHS is not monitoring this forum for requests for State support. Providers in need of vaccine who are unable to secure doses following the conditions outlined within the Vaccine Marketplace will need to submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

#### System Information

Order Record Type

Seek Transfer Match

Order Owner

Simon Couderc

Cancel

Save & New

Save

1. Scroll down and complete the bottom of the form:

- **Manufacturer:** select the COVID-19 vaccine brand you are seeking, or select **ANY** if any brand is acceptable
- **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

2. Click **SAVE**

### Audience

Healthcare  
Location Manager

### Tips

Your form will automatically change to an auto-lapsed status after 21 days. To extend, see the section named “[Maintain Your Requests Posted in the Vaccine Marketplace](#)”. The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

# Step 14 of 16: Close Your Listing

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note this is a request to seek a transfer match with other provider locations. Please use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and the State will not be regularly viewing these. It is intended to aid in communication between provider locations.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

\* Request Type

Extra (to Send Outbound)

\* Account Name

DoNotUse - QALoc1

\* Doses (Number)

10

County

City

\* Order Start Date

5/24/2021

\* Status

Active

--None--

Active

Closed/Inactive

Auto-Lapsed (Old)

Incomplete

111-111-1111

If you reach agreement with a provider on the conditions of transfer, the sending provider will enter a transfer in the CVMS Provider Portal. Once the inventory is delivered, you can **receive the Inbound Transfer to add the inventory to your location** ([Click here for instructions on the Transfer](#)).


When the transfer has been agreed on, close your post in the Marketplace:

1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on 

OrdersMy Seek Transfer Matches
3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

## Audience

Healthcare  
Location Manager

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

65

# Step 15 of 16: Set Inactivation Reason

▼ Seek Transfer Match Details

\* Request Type  
Wanted (to Receive Inbound) ▼

\* Order Start Date  
7/1/2021

\* Account Name  
DoNotUse-NotReaLoc Hotfix 1 ✕

\* Status  
Closed/Inactive ▼

Doses (Number)  
1,000

County  
Unknown

City  
Vik

Additional Comments (Optional)

Hub? ⓘ  
Yes(Hub 1)

Coverage Type? (Hub) ⓘ  
Regional

Primary Hub Associated to this Location? ⓘ

Transport: Pickup, Deliver, or Both? ⓘ  
Pickup Only

Inactivation Reason ⓘ

--None-- ▼

Completed (single Transfer)

Completed (multiple Transfers)

Fulfilled w/o using Marketplace

Unfulfilled or No longer applicable

Created in Error

Auto-Lapsed (Weeks w/o Modification)

Auto-Lapsed (Expiration Date past)

▼ Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory  
Search Vaccine Inventories... 🔍

Vaccine Product to Transfer  
Moderna (14 doses/vial) COVID-19 Vaccine

Expiration Date  
8/31/2021

Lot Transferred  
19128

▼ Additional Details if Wanted (To Receive Inbound)

Cancel Save

When the seek transfer match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

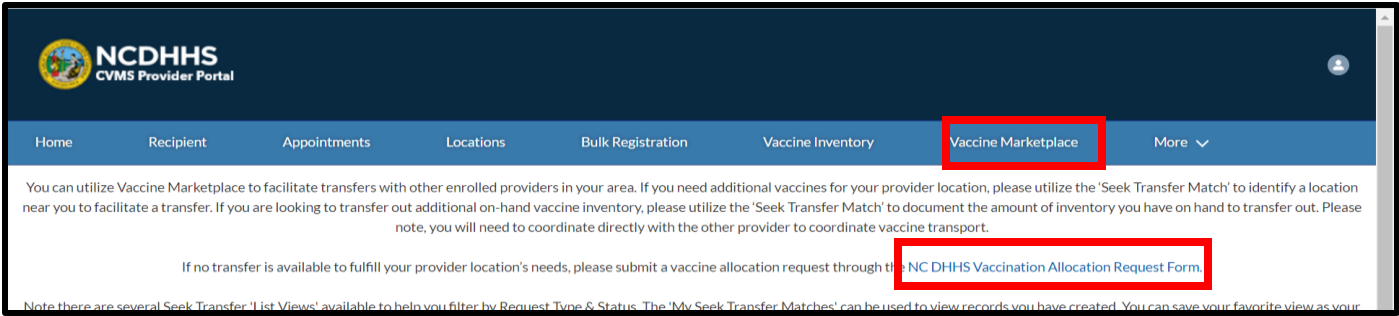
## Audience

Healthcare  
Location Manager

# Step 16 of 16: Request a New Shipment to the NCDHHS Team

If there is no inventory available nearby, you can submit a request to the State via the NCDHHS Vaccine Allocation Form: <https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#>. A link to the form was added to the **VACCINE MARKETPLACE** tab.

- 1. Navigate to **VACCINE MARKETPLACE**
- 2. Click the **NC DHHS VACCINATION ALLOCATION REQUEST FORM** link



- 3. Fill out the form and submit it

**Allocation Request Form** Page 1 of 3

**Provider Information**  
Please enter your provider organization and location information below.

1. Parent Organization\*

2. Please choose your provider location name\*  
Select one from below list:  
PIN - Provider Location Name

3. If your "PIN - Provider Location Name" is not in the dropdown above, please enter it here:

4. Provider Contact Name\*

5. Provider Contact Email\*

6. Provider Contact Phone Number\*

Next

**Allocation Request Form** Page 2 of 3

**Allocation Request**  
Please request vaccine doses below (inclusive of first and second doses).

7. Please request the number of Pfizer doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Pfizer doses. Pfizer doses requested must be in multiples of 1170.\*

8. Please request the number of Moderna doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Moderna doses. Moderna doses requested must be in multiples of 100.\*

9. Please request the number of Janssen doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Janssen doses. Janssen doses requested must be in multiples of 100.\*

10. Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the name of the on-site coordinator to assist with the transfer.\*

11. Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the phone number of the on-site coordinator to assist with the transfer.\*

Back Next

**Allocation Request Form** Page 3 of 3

**Recorded Doses and Attestation**

12. Please estimate the number of administered vaccinations that have not yet been recorded in CVMS.\*

13. By clicking this box, I affirm that I have reviewed the list of providers in my area with on-hand inventory and that these providers do not have inventory that cover my need.\*

14. By clicking this box, I understand that we must have vaccine administrations recorded into the COVID-19 Vaccine Management System (CVMS) within 72 hours of administration. On behalf of the Parent Organization, I certify that we will act in good faith and to the best of our abilities to comply with all expectations.\*

Back Done Enter Next Response



# Accessing the Marketplace Inquiries Report

The Marketplace Inquiries Report displays all inquiries for listings you posted in the Vaccine Marketplace.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **MARKETPLACE INQUIRIES REPORT**

The screenshot shows the Vaccine Marketplace interface. The top navigation bar includes tabs: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. The 'More' tab is highlighted with a red box. A dropdown menu is open from 'More', showing options: Organization Management, Help & Information, Reports (highlighted with a red box), Account Management, and Files. On the left sidebar, under the 'Reports' section, 'All Reports' is highlighted with a red box. The main content area displays a table of reports. The first report, 'Marketplace Inquiries', is highlighted with a red box. The table has columns: Report Name, Description, Folder, Created By, and Created On.

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Inventory Summary Report	This report allows users to view their location(s) vaccine inventories.	Provider Reports	George Jaramillo	2/1/2021, 12:02 AM
Created by Me	Marketplace Inquiries	All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'	Provider Reports	Copado Integration User	7/16/2021, 2:38 AM
Private Reports	Missing & Undetermined Hubs	Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned	Vaccine Marketplace Reports	Copado Integration User	7/19/2021, 5:44 PM
All Reports	Recipient Vaccination Report	This report shows the completed vaccine administration details for the current logged in user's location(s).	Provider Reports	George Jaramillo	1/31/2021, 11:08 PM
FOLDERS					
All Folders					
Created by Me					
Shared with Me					
FAVORITES					
All Favorites					

## Audience

Healthcare  
Location  
Manager

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal>.



# Accessing the Marketplace Inquiries Report (Continued)

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Report: Marketplace Inquiries

Marketplace Inquiries

All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'

Total Records20

Total Doses Requested3,063

Total Transfer Warning?0

Requested from Account	Requesting Account	Order (Marketplace Request)	Marketplace Inquiry: Marketplace Inquiry Name	Status	Doses Requested	Vaccine Product	Trans
<input type="checkbox"/> DoNotUseNotARealLocADA (14)	DoNotUseNotARealLocADA (14)	ORD-0017463 (1)	MKTINQ-0001	Open	300		Sendi
		Subtotal			300		
		ORD-0017465 (1)	MKTINQ-0002	Open	300	TestVaccine2 (Moderna)	Sendi
		Subtotal			300		
		ORD-0017468 (1)	MKTINQ-0008	Open	300		Sendi
		Subtotal			300		
		ORD-0017489 (1)	MKTINQ-0000	Open	300		Sendi
		Subtotal			300		
		ORD-0017553 (1)	MKTINQ-0007	Open	250		Sendi
		Subtotal			250		
		ORD-0017577 (1)	MKTINQ-0009	Open	23		Sendi
		Subtotal			23		
		ORD-0017579 (4)					

Row Counts

Detail Rows

Subtotals

Grand Total

## Audience

Healthcare  
Location  
Manager

# **Maintain Your Requests Posted in the Vaccine Marketplace**

# Step 1 of 3: Renew Your Extra or Wanted Listings

NCDHHS

CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

More

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

My Seek Transfer Matches

5 items • Sorted by Order Number • Filtered by my orders • Order Record Type • Updated a few seconds ago

Search this list...

	Order Number	Request Type	Status	St...	Acc...	Co...	City	Pr...	Brand	D...	Cre...	Las...
1	ORD-0017311	Extra (to Se...	Auto-Lapsed (Old)		Tra...	Wa...	Ral...	P...	pfizer	30	6/7...	6/7...
2	ORD-0017314	Wanted (to ...	Auto-Lapsed (Old)		Tra...	Wa...	Ral...	P...	pfizer	30	6/7...	6/7...
3	ORD-0017341	Wanted (to ...	Closed/Inactive		Tra...	Wa...	Ral...	M...	moderna	100	6/9...	6/9...
4	ORD-0017342	Extra (to Se...	Active		Tra...	Wa...	Ral...	P...	pfizer	300	6/9...	6/9...
5	ORD-0017343	Wanted (to ...	Active		Tra...	Wa...	Ral...	Ja...	janssen	300	6/9...	6/9...

Your post in the Vaccine Marketplace will expire:

- after 21 days,
- once linked inventory expires,
- if the linked inventories was fully consumed (available dose = 0).

You can renew your post within 21 days from original posting, or after 21 days of original posting by cloning your form and posting a new one.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Change the view to **MY SEEK TRANSFER MATCHES**
3. Open the request you wish to extend or to clone

## Audience

Healthcare  
Location Manager

## Tips

The Status color code is:  
**Yellow** for Auto-lapse (Old) requests. These requests can only be cloned, and the Status cannot be modified.

**Green** for Active requests for which you can still extend the duration.

**Red** for Closed/Inactive requests that can be cloned as well to start a new form with the same content.

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HEALTH AND  
HUMAN SERVICES

71

# Step 2 of 3: Renew Your Listing

Home

Recipient

Appointments

Locations

Bulk Registration

More

Order

ORD-0017342

Edit

Clone

Account Name	Status	Manufacturer	Doses (Number)	Order Start Date
Training Team Vaccine Provider - Site 1	Active		300	6/9/2021

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type	Order Start Date
Extra (to Send Outbound)	6/9/2021
Account Name	Status
Training Team Vaccine Provider - Site 1	Active
Doses (Number)	Status Indicator

If you request is still active and you wish to extend the deadline before the request automatically expires, update the request date.

1. Click on **EDIT**
2. Update the **ORDER START DATE** to Today's date to reinitiate the 21-day countdown
3. Click **SAVE**

## Audience

Healthcare  
Location Manager

# Step 3 of 3: Clone Your Listing

Home

Recipient

Appointments

Locations

Bulk Registration

More

Order

ORD-0017314

Edit

Clone

Account Name

Status

Manufacturer

Doses (Number)

Training Team Vaccine Provider - Site 2

Auto-Lapsed (Old)

Pfizer-BioNtech

30

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note this is a request to seek a transfer match with other provider locations. Please use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and the State will not be regularly viewing these. It is intended to aid in communication between provider locations.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type

Wanted (to Receive Inbound)

Order Start Date

6/7/2021

Account Name

Training Team Vaccine Provider - Site 2

Status

Auto-Lapsed (Old)

Doses (Number)

30

Status Indicator

County

Wake

HCP Contact Name

simon c

City

Raleigh

HCP Contact Phone

222-333-4444

If your request’s status is **AUTO-LAPSED (OLD)** or **CLOSED/INACTIVE** and you wish to post an identical new form, use the clone feature.

1. Click on **CLONE**
2. Update the **ORDER START DATE** to Today’s date to reinitiate the 21-day countdown
3. Update the Status to **ACTIVE**
4. Update any other fields if necessary
5. Click **SAVE**

Audience

Healthcare Location Manager

# Transferring Vaccine between two Providers

# Transfer Vaccine Inventories Between Two Locations

The screenshot displays the NCDHHS CVMS Provider Portal interface. At the top, there is a navigation bar with the NCDHHS logo and a user profile icon. Below the navigation bar, the main content area shows a 'Vaccine Inventory' card for 'Lot 123456 Exp 5/1/2022'. The card includes buttons for 'Request Transfer/Redistribution', 'Change Status', and 'Edit'. A modal window titled 'Request Transfer/Redistribution' is open in the foreground. The modal contains the following text: 'Inventory Transfer/Redistribution', 'After reading these instructions click \'Cancel\'. To submit a Transfer or Redistribution Request: 1) Click \'Related\' ; 2) Find the \'Orders\' related list & click \'New\' ; 3) Complete the Transfer/Redistribution Request with \'Status=Submitted\''. At the bottom of the modal are 'Cancel' and 'Save' buttons. In the background, partially obscured by the modal, is a form with fields for 'Lot 123456', 'Expiration Date 5/1/2022, 12:00 PM', 'Total Vials 100', 'Account Training Team Vaccine Provider - Site 2', 'Date Received 5/13/2021, 10:20 AM', 'Status', 'Wasted', and 'Federal Allocation?'.

When a COVID-19 vaccine is to be redistributed / transferred to another provider location

- Healthcare Location Manager enters the COVID-19 Vaccine Redistribution/Transfer Request into the CVMS Provider Portal with details such as Sending Location, Receiving Location, lot number, and quantity to redistribute/transfer. The approved redistribution/transfer is reflected as an order for the Receiving Location.
- The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory Record auto-created, but the quantity is noted as "in transit".
- Receiving Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available".

# **Initiate an Outbound Transfer or Redistribution**



# Overview of an Outbound Redistribution/Transfer

Redistribution and transfer requests require **NCDHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements. There are three scenarios that transfer requests will fall under.

1. If a provider requests a redistribution between two CVMS Provider locations within the same organization, who have an existing redistribution agreement, **THE TRANSFER IS AUTOMATICALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
2. If a provider requests a redistribution between two locations within the same organization, but there is no existing redistribution agreement, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
3. If a provider requests a transfer to a location that is outside their location's organization, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**

## Audience

Healthcare  
Location Manager

# Step 1 of 10: Locate Inventory for Redistribution/Transfer

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request through the CVMS Provider Portal.

- 1. From the Home Page, click the **VACCINE INVENTORY** tab
- 2. Select the correct **VACCINE INVENTORY** record that you want to redistribute/transfer to a different location / organization

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

4 items • Updated a few seconds ago

Search this list...

Settings

Table View

Refresh

Print

Filter

	Vaccine Inven...	Product Name	Lot	Total Doses	Doses Ava...	Expiration Da...	Date and Tim...	Usage (First o...	Account N..
1	<a href="#">Delivery 02/09/2...</a>	Pfizer-BioNTech ...	123	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	First Dose only (...)	Clinic ABC L
2	<a href="#">Grace Pfizer Inve...</a>	Pfizer-BioNTech ...	909	100	133	2/28/2021, 12:0...	1/12/2021, 11:3...		Clinic ABC L

## Audience

Healthcare  
Location Manager

## Tips

Selecting the **OUTBOUND TRANSFER** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

# Step 2 of 10: Creating a Transfer/Redistribution Request

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Vaccine Inventory

Grace Pfizer Inventory

Request Transfer/Redistribution

Change Status

Edit

Account

Total Doses

Extra Doses

Doses Available

Doses Administered

Doses Wasted

Clinic ABC Loc 1

100

100

133

49

5

DETAILS

RELATED

Orders (0)

New

Appointments (6+)

Appointment	Contact Name	Status	Vaccine Status
00112886	3550retest1 user	Closed	Dose 1 Administered
00112834	reji8 ayod8	Closed	Dose 1 Administered
00112689	Grace Wix	Closed	Dose 2 Administered
00112166	Tester Test	Closed	Dose 2 Administered
00112165	Peggy Bundy	Closed	Dose 2 Administered
00112161	Julius Rand	Closed	Dose 1 Administered

View All

- From the Vaccine Inventory Record, select the **RELATED** tab
- Locate the **ORDERS** related list and click **NEW**

## Audience

Healthcare  
Location Manager

## Tips

Selecting the **REQUEST TRANSFER / REDISTRIBUTION** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

## Step 3 of 10: Edit the Order Transfer Record

### New Order: Transfer or Redistribution

#### Transfer Information

\* Account Name  
Search Accounts...

Vaccine Receiver

\* Dose Transferred

\* Transfer Reason

Reason for Request

\* Status  
--None--

Vaccine Receiver (Lookup External Loc)  
Search Provider Enrollment (Locations)...

\* Vials Transferred

\* Order Start Date

Associated Vaccine Inventory  
Delivery 06/25/2021

Unable to find Vaccine Receiver ☐

#### Receiving COVID

Receiving Location Name

Receiving Location Street

\* Transfer Reason

--None--

Redistribution (within Organization)

I have extra, Receiver has need

Sending Extra Vaccines to a HUB

Less than Minimum Quantity for Direct Shipment/Pa...

Marketplace Match

Other

A pop-up window will appear titled **NEW ORDER: TRANSFER OR REDISTRIBUTION** for you to fill out.

1. Enter your own location for **ACCOUNT NAME**
2. Select **SUBMITTED** for status
3. If the receiving provider / location is associated with your account in CVMS, enter the name of the receiving provider in the **VACCINE RECEIVER** field
4. If the receiving provider is in CVMS but not associated with your location, enter the name in the **VACCINE RECEIVER (LOOKUP EXTERNAL LOC)** field
5. If the receiving provider / location is not built into CVMS, select the **UNABLE TO FIND VACCINE RECEIVER** button
6. Enter the desired number of doses and vials to be transferred
7. Select a **TRANSFER REASON**
8. Enter the desired date for transfer

### Audience

Healthcare  
Location Manager

### Tips

The doses transferred must be less than the doses currently available on the selected Vaccine Inventory Record.

The Vials Transferred number must be equal to the Doses Transferred divided by the standard doses per vial for the vaccine inventory.

Save request as a Draft Status to review all information prior to submitting. Transfer request will be reviewed once the request status has been changed to submitted.

# Step 4 of 10: Submit the Order Transfer Record

New Order: Transfer or Redistribution

Receiving COVID-19 Enrolled Provider Information

Receiving Location Name (CVMS)  
Test Location

Receiving Location Street Address  
123 Main Street

Receiving Location City  
Raleigh

Receiving Location Phone  
123-456-7890

Receiving Location Zip  
12345

Receiving Location Primary Vaccine Coord  
Vax Coordinator

Receiving Location Primary Coord Email  
vax.j.coordinator@mailinator.com

Sending Provider to check box below to confirm adherence to each requirement:

Adherence to all Requirements  
☒

Requirement 1:  
Sending Provider and Receiving Provider location names listed above match exactly how they appear in the COVID-19 Vaccine Management System (CVMS) Provider Enrollment Portal.

Cancel

Save & New

Save

Expiration Date Communication

Reminder: Please ensure you have clearly communicated to Receiving Location if the vaccine doses are expiring in <30 days, so they understand the urgency of administering the doses quickly to prevent/reduce waste.

Adherence to Expiration Date Reminder  
☒

Scroll down within the **NEW ORDER: TRANSFER OR REDISTRIBUTION** pop-up window.

1. If the receiving provider / location is not registered in CVMS, fill in the Location Name, Street Address, City, Phone Number, Zip Code, and Vaccine Coordinator's Name and Phone Number for the receiving provider
2. Review all the listed requirements for initiating a transfer / redistribution request
3. Select the **ADHERENCE TO ALL REQUIREMENTS** checkbox
4. If the vaccine inventory being transferred expires within 30 days, read the **EXPIRATION DATE COMMUNICATION** and check **ADHERENCE TO EXPIRATION DATE REMINDER**
5. Click **SAVE**

## Audience

Healthcare  
Location Manager

## Tips

If you selected the **UNABLE TO FIND VACCINE RECEIVER** checkbox at the top of the form, you must fill in **ALL** fields in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section.


While no action is required outside of 30 days, any vaccine with an expiration date within 30 days will trigger a validation rule that requires the sending provider to confirm that they have clearly communicated to the receiving provider the upcoming expiration date of the vaccine being transferred.

# Step 5 of 10: Confirm the Redistribution/Transfer Request was Submitted

- 1. On the **ORDERS** related list from the Vaccine Inventory Related Tab, the new Order redistribution or transfer request will appear
- 2. If the status shows as **SUBMITTED** or **PROCESSING**, that indicates the redistribution or transfer is pending approval from NCDHHS Immunization Branch
- 3. If the status appears as **TRANSFER IN TRANSIT**, that indicates the transfer has been approved by NCDHHS Immunization Branch

## Audience

Healthcare  
Location Manager

 Vaccine Inventory  
Grace Pfizer Inventory

Request Transfer/Redistribution


Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
<a href="#">Clinic ABC Loc 1</a>	100	100	133	49	5

DETAILS

RELATED

 Orders (1)

New

Order Number	Status	Vaccine Receiver	Dose Transferred
<a href="#">ORD-0000271</a>	Submitted		100

View All

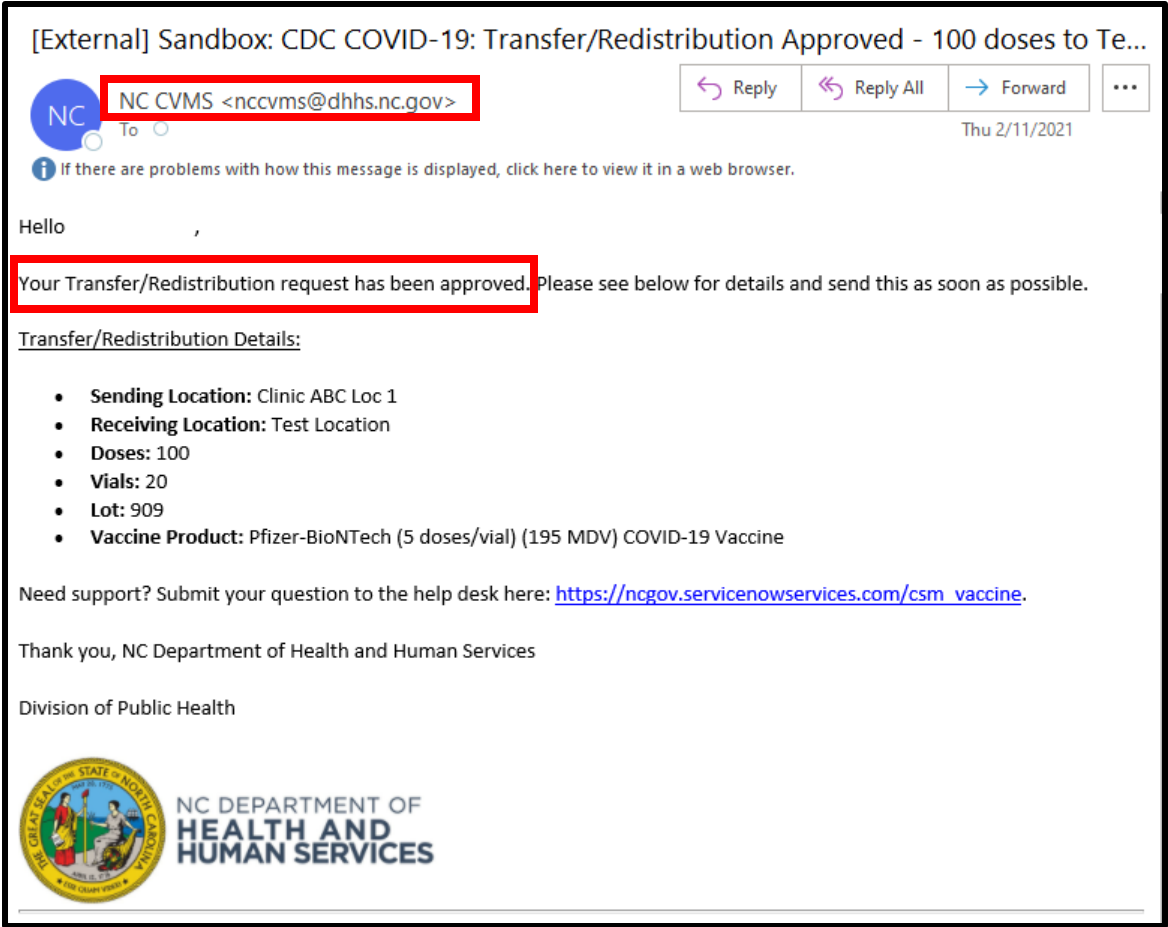
# Step 6 of 10: Provide Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **TRANSFER YOUR VACCINE INVENTORY** to the receiving location.

As soon as the transfer is approved, the Healthcare Location Manager who initiated the transfer request will receive an automated email indicating the approval.

## Audience

Healthcare  
Location Manager




# Step 7 of 10: Provide Redistribution/Transfer Details

You can **UPDATE** the Order Transfer Record with the **ACTUAL TRANSFER DETAILS** to support tracking of the shipment. The Order Transfer Record can be located via the Vaccine Inventory Record that is providing the inventory.

- 1. From the Home page, click the **VACCINE INVENTORY** tab
- 2. Select the correct **VACCINE INVENTORY** Record

## Audience

Healthcare  
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

4 items • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Filter

	Vaccine Inven... ▾	Product Name ▾	Lot ▾	Total Doses ▾	Doses Ava... ▾	Expiration Da... ▾	Date and Tim... ▾	Usage (First o... ▾	Account N..
1	<a href="#">Delivery 02/09/2...</a>	<a href="#">Pfizer-BioNTech ...</a>	123	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	First Dose only (...)	<a href="#">Clinic ABC L</a>
2	<a href="#">Grace Pfizer Inve...</a>	<a href="#">Pfizer-BioNTech ...</a>	909	100	133	2/28/2021, 12:0...	1/12/2021, 11:3...		<a href="#">Clinic ABC L</a>



# Step 8 of 10: Open the Approved Redistribution/Transfer Request

- 1. Navigate to the **RELATED TAB**
- 2. Locate the Orders related list
- 3. Confirm that the Order is in **TRANSFER IN TRANSIT** status and click the **ORDER NUMBER** of the Transfer Request




## Audience

Healthcare  
Location Manager

## Tips

Review the Vaccine Receiver to confirm it is the correct record.



**NCDHHS**  
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Vaccine Inventory

Grace Pfizer Inventory

Request Transfer/Redistribution

Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
<a href="#">Clinic ABC Loc 1</a>	100	100	33	49	5

DETAILS

**RELATED**

Orders (1)

New

Order Number	Status	Vaccine Receiver	Dose Transferred
<a href="#">ORD-0000271</a>	Transfer in Transit	<a href="#">Test Location</a>	100

View All

# Step 9 of 10: Update the Order Transfer Record

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Order  
ORD-0000271

Edit

Account Name

Vaccine Receiver

Status

Dose Transferred

Order Start Date

Clinic ABC Loc 1

Test Location

Transfer in Transit

100

2/11/2021

DETAILS

RELATED

COVID-19 Vaccine Redistribution/Transfer Request Form

Redistribution/Transfer Instructions

To request redistribution or transfer of COVID-19 vaccine inventory from a location with an approved redistribution agreement (not required for a transfer) on file to a location within their organization (Redistribution) or outside their organization (Transfer), the Sending Provider shall complete and submit this form. Redistribution and transfer requests for COVID-19 vaccines require NC DHHS Immunization Branch approval to ensure proper storage capabilities and tracking of COVID-19 vaccine inventory movements. All COVID-19 vaccine providers must comply with the CDC requirements for vaccine management, including storage and handling, and temperature monitoring at all times. Providers must keep all records related to COVID-19 vaccine management for a minimum of 3 years, or longer if required by law. Please call 1-877-873-6247 if you have any questions.

Transfer Information

Approval

Approver's Comments

Sending Location Details

Sending Location Date and Time

Sending Location Comments

System Information

Created By

Steve DiGangi , 2/11/2021, 10:14 PM

Last Modified By

Steven DiGangi , 2/11/2021, 11:05 PM

Doses Per Vial (Number)

5

Once you have the **ORDER TRANSFER RECORD** open, you can provide the **TRANSFER DETAILS REQUIRED**.

1. Scroll down to the **SENDING LOCATION DETAILS** section
2. Click the **PENCIL ICON** next to **SENDING LOCATION DATE AND TIME**

Audience

Healthcare  
Location Manager

# Step 10 of 10: Submit Shipment Details

Once you click edit, you will be able to update the record and save your changes.

- 1. Enter the **SENDING LOCATION DATE** and **TIME** when the vaccines were sent
- 2. Enter the **TRANSFER TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
- 3. Click **SAVE**

## Audience

Healthcare  
Location Manager

▼ Sending Location Details

Sending Location Date and Time ⓘ

Date

📅

Time

🕒

Sending Location Comments ⓘ

▼ System Information

Created By


Steve DiGangi, 2/11/2021, 10:14 PM

Cancel

Save

Last Modified By

Steve DiGangi, 2/11/2021, 11:05 PM

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

87

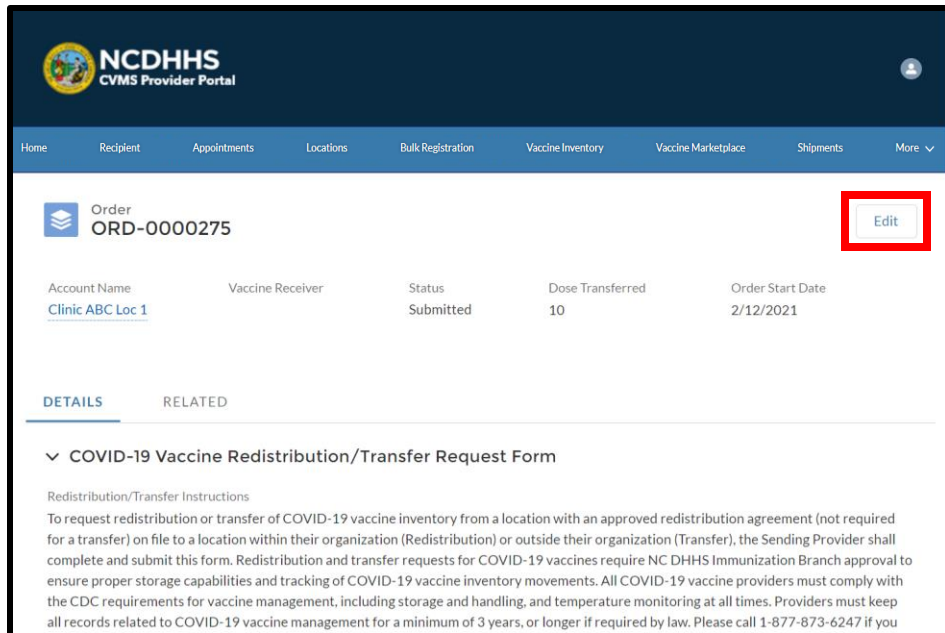
# Editing Order Redistribution or Transfer Requests

Transfer requests can still be **EDITED** while in **SUBMITTED** or **DRAFT** status.

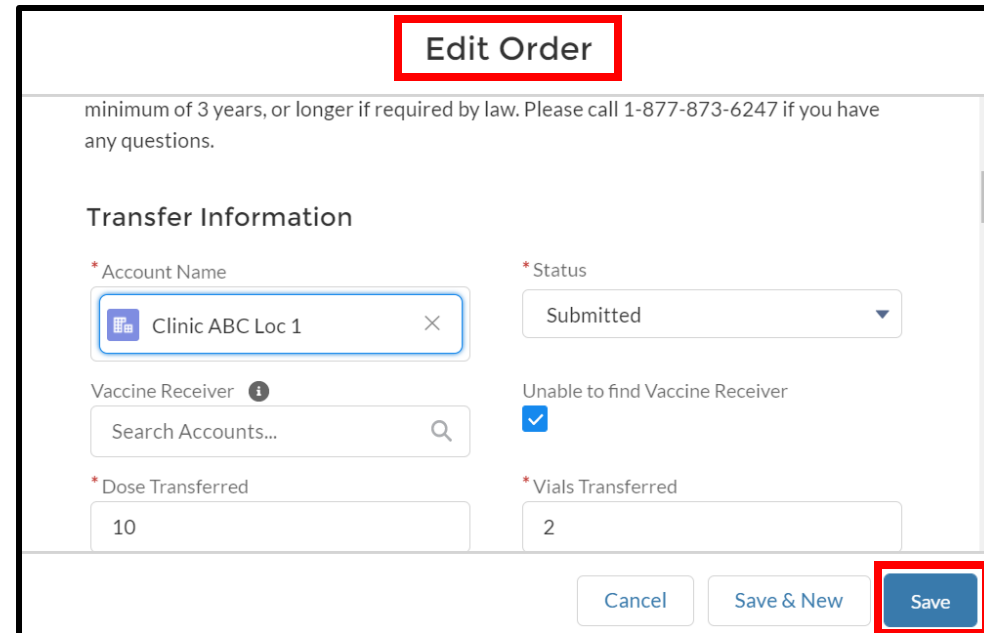
1. Select the Vaccine Inventory Record that has a transfer request
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **SUBMITTED** or **DRAFT** status
3. Click on the **EDIT** button
4. Make changes to the necessary fields and click **SAVE**

## Audience

Healthcare  
Location Manager



The screenshot shows the NCDHHS CVMS Provider Portal. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. The main content area displays the 'Order' details for 'ORD-0000275'. Below the order ID, there is a table with columns: Account Name (Clinic ABC Loc 1), Vaccine Receiver, Status (Submitted), Dose Transferred (10), and Order Start Date (2/12/2021). An 'Edit' button is highlighted with a red box. Below the table, there are tabs for 'DETAILS' and 'RELATED'. The 'RELATED' tab is selected, showing a section for 'COVID-19 Vaccine Redistribution/Transfer Request Form' with instructions and a 'Redistribution/Transfer Instructions' link.



The screenshot shows the 'Edit Order' form. The title 'Edit Order' is highlighted with a red box. The form contains the following fields and options:

- Account Name:** Clinic ABC Loc 1 (with a search icon)
- Status:** Submitted (dropdown menu)
- Vaccine Receiver:** Search Accounts... (with a search icon)
- Dose Transferred:** 10
- Vials Transferred:** 2

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

# Recalling Order Redistribution or Transfer Requests

NCDHHS

CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Order

ORD-0000272

Edit

Account Name

Vaccine Receiver

Status

Dose Transferred

Crimson Skies - Location 3

Crimson Skies - Location 1

Processing

10

DETAILS

RELATED

Order History (5)

Date	Field	User	Original Value	New Value
2/11/2021, 10:44 PM	Record locked.	Nicholas TestCrimson		
2/11/2021, 10:44 PM	Created.	Nicholas TestCrimson		
2/11/2021, 10:44 PM	Price Book	Nicholas TestCrimson		Standard Price Book
2/11/2021, 10:44 PM	Submitted for Approval	Nicholas TestCrimson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2/11/2021, 10:44 PM	Status	Nicholas TestCrimson	Submitted	Processing

View All

Approval History (2)

Recall

Step Name	Date	Status	Assigned To
Review Transfer or Redistrib...	2/11/2021, 10:44 PM	Pending	Transfer and Redistribution A...
Approval Request Submitted	2/11/2021, 10:44 PM	Submitted	Nicholas TestCrimson

View All

Transfer requests can be **RECALLED** while in **PROCESSING** status. The recall function is only used when transferring between two locations in the same organization that do not have an existing redistribution agreement (Scenario #2 from the **Overview of an Outbound Redistribution/Transfer** slide). In any other scenario, the Healthcare Location Manager should use the **EDIT** capability.

1. Select the **VACCINE INVENTORY RECORD** that has a transfer request.
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **PROCESSING** status
3. Navigate to the **RELATED** tab on the Order Transfer Record
4. Scroll down to Approval History and click on **RECALL**
5. Add comments and click **RECALL**
6. **ORDER WAS RECALLED** will appear at the top of the screen

## Audience

Healthcare  
Location Manager

NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

89

# **Receive Inbound Transfer or Redistribution**

# Step 1 of 4: Processing an Inbound Redistribution/Transfer

If you are **RECEIVING** an **INBOUND REDISTRIBUTION/TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound redistribution/transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound redistributions/transfers from the **ADD INVENTORY PROCESS**.

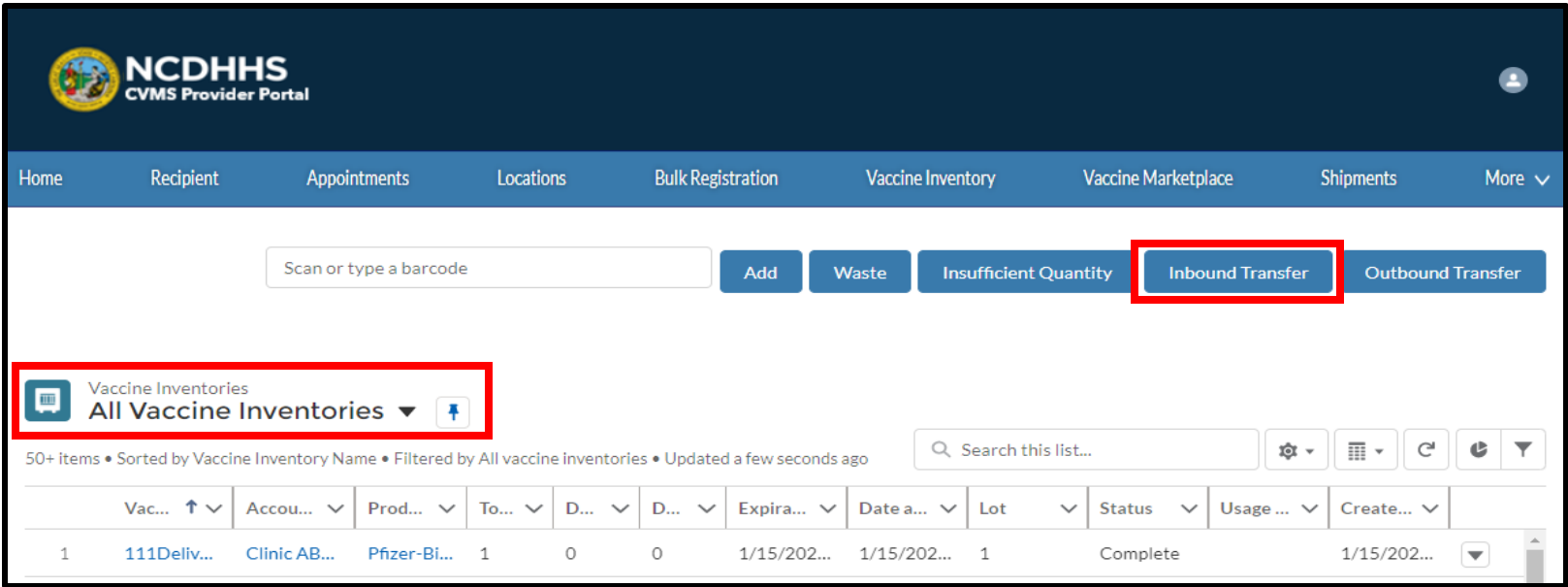
- 1. From the home page, click **VACCINE INVENTORY**
- 2. Click **INBOUND TRANSFER**

## Audience

Healthcare  
Location Manager

## Tips

Inbound redistributions/transfers are **not** processed from the Add Inventory Process.



# Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** Records that are incoming redistributions/transfers to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

- 1. Select the correct **VACCINE INVENTORY** Record
- 2. Click **NEXT**

## Audience

Healthcare  
Location Manager

## Tips

Identify Vaccine Inventory Records for inbound redistribution/transfer.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Please select the incoming vaccine transfer for which you are confirming receipt.

Vaccine Inventory Name	Product ID	Account Name	Status	Incoming Transfer Doses	Serial Number
<input type="radio"/> Delivery 12/19/2020	Pfizer-BioNTech (195 MDV) COVI...	Quality Hospital (Location 1)	Incoming Transfer in Transit	100	

Next



# Step 3 of 4: Complete the Inbound Transfer form

Once you select the Vaccine Inventory Record, you will see the Vaccine Inventory details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound redistribution/transfer is now processed.

- 1. Enter the **DATE RECEIVED**
- 2. Enter the **DOSES RECEIVED**
- 3. Click **NEXT**

## Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Name : Delivery 12/19/2020

Product Name : Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

NDC # :

Lot : 123456745

Expiration Date : 12/19/2021, 12:00 PM

Serial Number :

Account : Quality Hospital (Location 1)

Date Received

Dec 21, 2020

Doses Received

100

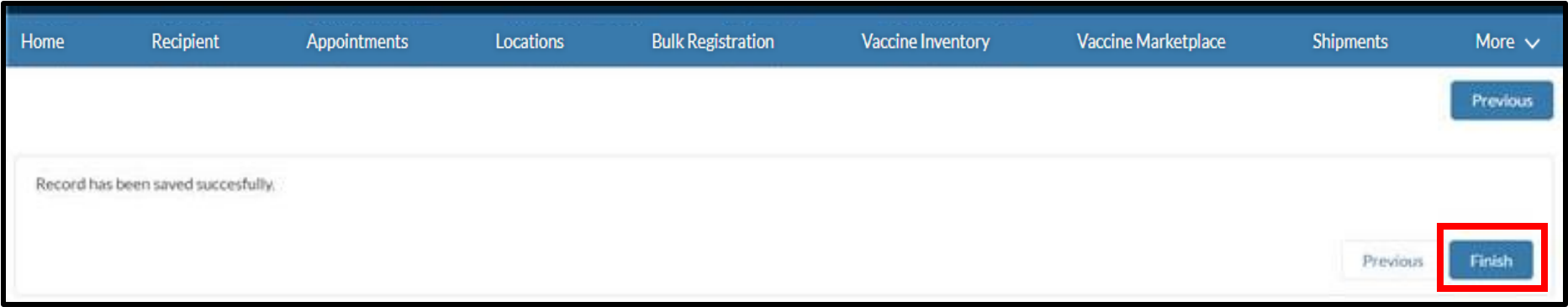
Incoming Doses Quantity : 100

PreviousNext

# Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound redistribution/transfer is processed and added to your inventory.

- 1. Click **FINISH**



The screenshot shows a web application interface with a blue navigation bar at the top containing the following links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More (with a dropdown arrow). Below the navigation bar, there is a message box that says "Record has been saved successfully." In the bottom right corner of the main content area, there are two buttons: "Previous" and "Finish". The "Finish" button is highlighted with a red rectangular border.

## Audience

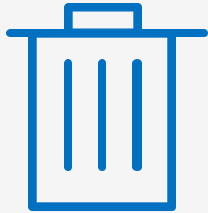
Healthcare  
Location Manager

## Tips

Complete the inbound transfer form by clicking Finish.

# Declaring Inventory Depreciation Events

# When to declare in CVMS a COVID-19 Vaccine Inventory Deprecation



## When a COVID-19 vaccine is wasted

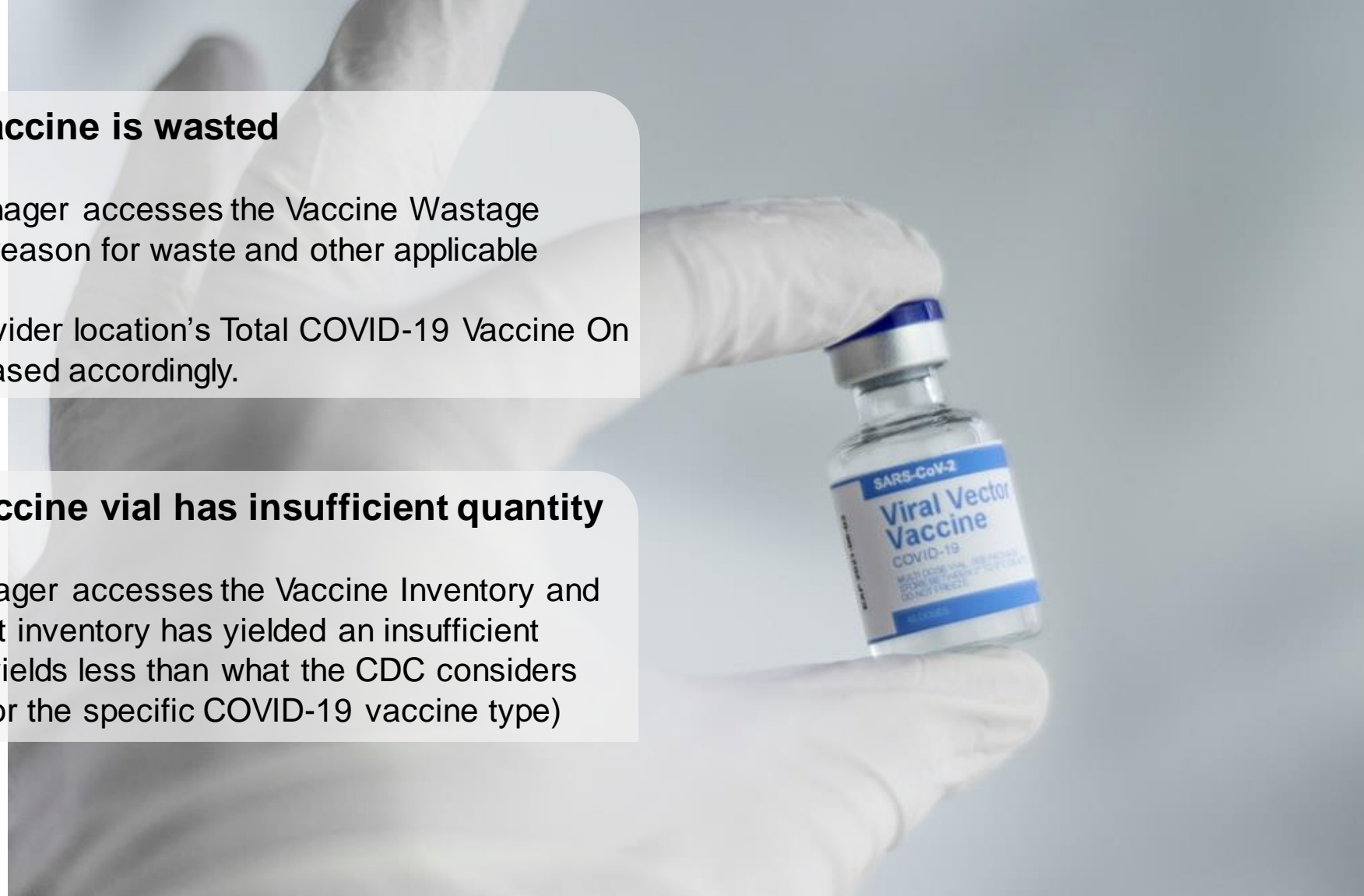
Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.

Once submitted, the provider location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.



## When a COVID-19 vaccine vial has insufficient quantity

Healthcare Location Manager accesses the Vaccine Inventory and inputs that a vial from that inventory has yielded an insufficient quantity (any time a vial yields less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type)



# Log a Vaccine Wastage

# Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 vaccine inventory management guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE WASTAGE** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

*Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 vaccines.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

## Audience

Healthcare  
Location Manager



Home Recipient Appointments Locations Bulk Registration **Vaccine Inventory** Vaccine Marketplace Shipments More ▾

# Step 2 of 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

- 1. Click **WASTE** at the top of the page
- 2. After clicking **WASTE**, you will be directed to the **VACCINE WASTAGE SURVEY FORM**

## Audience

Healthcare  
Location Manager

## Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory Hyperlink.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

	Vac...	Accou...	Prod...	To...	D...	D...	Expira...	Date a...	Lot	Status	Usage ...	Create...
1	111Deliv...	Clinic AB...	Pfizer-Bi...	1	0	0	1/15/202...	1/15/202...	1	Complete		1/15/202...

# Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 vaccine inventory waste.

- 1. Check the **BOX** for the **APPROPRIATE ROW(S)**
- 2. Click **NEXT** at the bottom of the page
- 3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Report Waste

Please select the vaccines for which you would like to report a wastage event. The information will only have to be entered once for all vaccines selected.

<input type="checkbox"/>	Vaccine Inventory... ▾	Product Name ▾	Account Name ▾	Status ▾	Doses Available ▾	Serial Number ▾	Lot ▾
<input type="checkbox"/>	Delivery 12/02/2020 - v2	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	77	31415926535	LT-23451
<input type="checkbox"/>	Delivery 12/02/2020	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	0	1123581321	LT-12345
<input checked="" type="checkbox"/>	Delivery 12/04/2020	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	140	2468101214	LT-02241989
<input type="checkbox"/>	E2E Testing			Available	186	90	90

Next

## Audience

Healthcare  
Location Manager

## Tips

You will be able to report a Partial or Full Vaccine shipment wastage on the next page.



# Step 4 of 5: Complete the Vaccine Wastage Survey form

Report Waste

Date Wastage Occurred

Jul 1, 2021

Doses Wasted

Entire vaccine inventory wasted

Reason for Waste

None

Description

Reason for Waste

None

None

Broken Vial/syringe

Expired Vaccine

Failure to store properly upon receipt

Lost or unaccounted for vaccine

Mechanical failure

Natural disaster/power outage

Open vial but all doses not administered

Recall

Storage Unit too cold

Storage Unit too warm

Vaccine drawn into syringe but not administered

Vaccine spoiled in transit(Freeze/Warm)

Other

1. Populate the required **REPORT WASTE FIELDS**:
1. Date Wastage Occurred

2. Doses Wasted

3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.

4. Reason for Waste
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

## Audience

Healthcare  
Location Manager

## Tips

If an inventory reaches expiration, you can check **ENTIRE VACCINE INVENTORY WASTED** then select **EXPIRED VACCINE** from the dropdown. This will change your available doses to zero.

# Step 5 of 5: Submit the Vaccine Wastage Survey form

The **VACCINE WASTAGE RECORD** is now submitted, and your COVID-19 Vaccine Inventory Record will be automatically updated.

- 1. Click **FINISH**
- 2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE WASTAGE SURVEY FORM PAGE**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Report Waste

Wastage event for the chosen vaccines have been created.

Finish

## Audience

Healthcare  
Location Manager

## Tips

After clicking **FINISH**, you will see your Vaccine Wastage Record displayed on the All Wastage List View.

# Log Insufficient Quantity

# Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 Vaccine Inventory Management Guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE INSUFFICIENT QUANTITY** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Insufficient Quantity will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

*Remember, examples of COVID-19 Insufficient Quantity events include any time less than the CDC standard doses are obtained from a vial for that specific vaccine manufacturer.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

## Audience

Healthcare  
Location Manager



Home Recipient Appointments Locations Bulk Registration **Vaccine Inventory** Vaccine Marketplace Shipments More ▾

## Step 2 of 5: Click Insufficient Quantity at the top of the page

At the top of the page, you will see the different actions you can take to manage your COVID-19 Vaccine Inventory Records. The **ALL VACCINE INVENTORY LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

To record an Insufficient Quantity event:

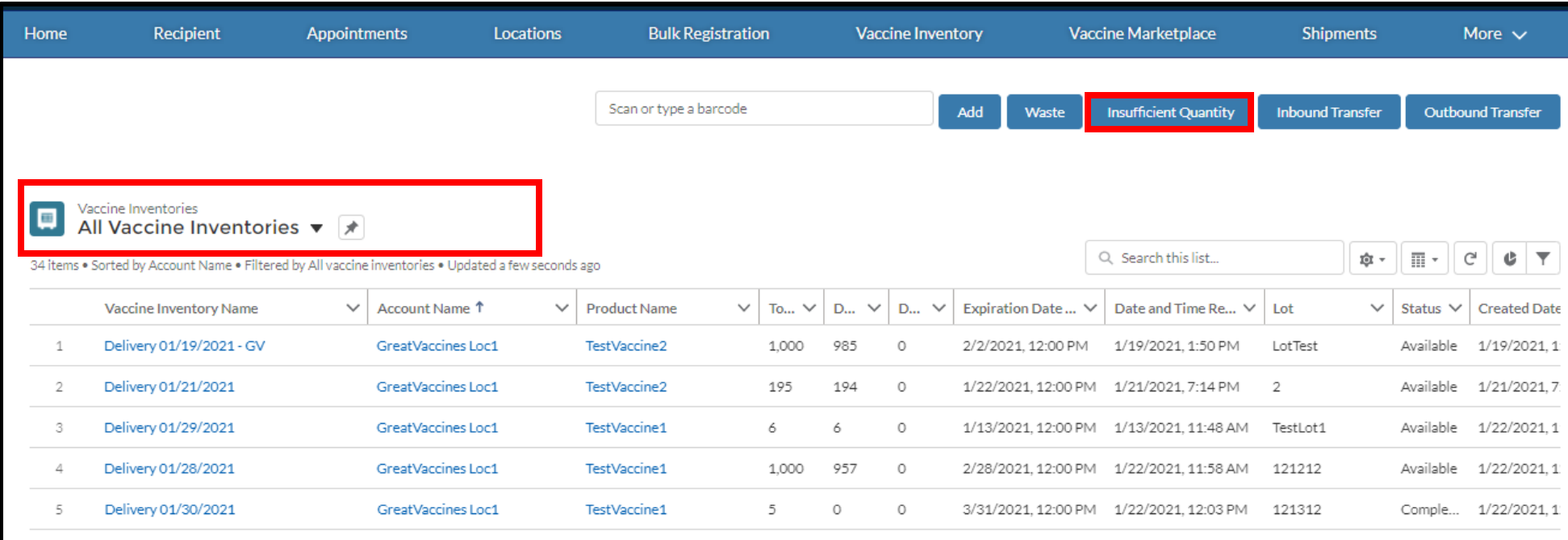
1. Click **INSUFFICIENT QUANTITY** at the top of the page
2. After clicking **INSUFFICIENT QUANTITY**, you will be directed to the **VACCINE INSUFFICIENT QUANTITY** page

### Audience

Healthcare  
Location Manager

### Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory hyperlink.



The screenshot shows the top navigation bar with links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below the navigation bar is a search bar and a row of action buttons: Add, Waste, Insufficient Quantity (highlighted with a red box), Inbound Transfer, and Outbound Transfer. Below the buttons is a section titled 'Vaccine Inventories' with a dropdown menu 'All Vaccine Inventories' (highlighted with a red box) and a search bar 'Search this list...'. Below this is a table with 12 columns: Vaccine Inventory Name, Account Name, Product Name, To..., D..., D..., Expiration Date..., Date and Time Re..., Lot, Status, and Created Date. The table contains 5 rows of data.

	Vaccine Inventory Name	Account Name	Product Name	To...	D...	D...	Expiration Date...	Date and Time Re...	Lot	Status	Created Date
1	<a href="#">Delivery 01/19/2021 - GV</a>	GreatVaccines Loc1	<a href="#">TestVaccine2</a>	1,000	985	0	2/2/2021, 12:00 PM	1/19/2021, 1:50 PM	LotTest	Available	1/19/2021, 1
2	<a href="#">Delivery 01/21/2021</a>	GreatVaccines Loc1	<a href="#">TestVaccine2</a>	195	194	0	1/22/2021, 12:00 PM	1/21/2021, 7:14 PM	2	Available	1/21/2021, 7
3	<a href="#">Delivery 01/29/2021</a>	GreatVaccines Loc1	<a href="#">TestVaccine1</a>	6	6	0	1/13/2021, 12:00 PM	1/13/2021, 11:48 AM	TestLot1	Available	1/22/2021, 1
4	<a href="#">Delivery 01/28/2021</a>	GreatVaccines Loc1	<a href="#">TestVaccine1</a>	1,000	957	0	2/28/2021, 12:00 PM	1/22/2021, 11:58 AM	121212	Available	1/22/2021, 1
5	<a href="#">Delivery 01/30/2021</a>	GreatVaccines Loc1	<a href="#">TestVaccine1</a>	5	0	0	3/31/2021, 12:00 PM	1/22/2021, 12:03 PM	121312	Comple...	1/22/2021, 1

# Step 3 of 5: Find the appropriate vaccine(s) on the list

Once you are directed to the **VACCINE INSUFFICIENT QUANTITY** page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report an insufficient quantity.

- 1. Check the **BOX** for the appropriate **VACCINE INVENTORIES**
- 2. Click **NEXT** at the bottom of the page
- 3. After clicking **NEXT**, you will see the **VACCINE INSUFFICIENT QUANTITY SURVEY FORM**

## Audience

Healthcare  
Location Manager

## Tips

You will only be able to record insufficient quantity events for the same vaccine product if you choose to select more than one Vaccine Inventory Record.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Vaccine Insufficient Quantity

Please select the vaccines for which you would like to create an insufficient quantity event. The information will only have to be entered once for all vaccines selected.

Vaccine Inventory Name

Product Name

☐

Grace Moderna First Dose Inventory

Moderna (10 MDV) COVID-19 Va...

☐

Grace Pfizer 4.1 Inventory

Pfizer-BioNTech (6 doses/vial) (19...

☐

Delivery 01/15/2021

Pfizer-BioNTech (5 doses/vial) (19...

☐

New Grace Pfizer BioTech Inventory for testing abcdef

TestVaccine1

☐

Pfizer 6doses Delivery 02/10/2021

Pfizer-BioNTech (6 doses/vial) (19...

☒

Lot 1234567

Pfizer-BioNTech (5 doses/vial) (19...

☐

Pfizer 1 release inventory

Pfizer-BioNTech (25 MDV) COVID...

☐

Moderna Delivery 02/09/2021

Moderna (10 MDV) COVID-19 Va...

Clinic ABC Loc 1

Available

198

Lot2021

☐

Delivery 02/02/2021

TestVaccine1

Clinic ABC Loc 1

Available

1,099

test

☐

Grace Moderna Inventory

Pfizer-BioNTech (5 doses/vial) (19...

Clinic ABC Loc 1

Available

35

990

☐

SomTestInventoryUAT3-2

TestVaccine2

Clinic ABC Loc 1

Available

80

63241645

☐

Delivery 01/26/2021

Pfizer-BioNTech (5 doses/vial) (19...

Clinic ABC Loc 1

Available

4

11101

☐

Test0125-Delivery 01/25/2021

Moderna (10 MDV) COVID-19 Va...

Clinic ABC Loc 1

Available

997

L-88

☐

Delivery 01/27/2021

TestVaccine1

Clinic ABC Loc 1

Available

17

3252342

☐

Grace Pfizer Inventory

Pfizer-BioNTech (5 doses/vial) (19...

Clinic ABC Loc 1

Available

133

909

☐

Expiration 1/13/2021 8:30

Pfizer-BioNTech (5 doses/vial) (19...

Clinic ABC Loc 1

Available

77

100

Next

NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

106

## Step 4 of 5: Complete the Vaccine Insufficient Quantity Survey form

### 1. Populate the required **REPORT INSUFFICIENT QUANTITY FIELDS**:

1. Insufficient Quantity Date
2. Doses Insufficient Quantity
3. Select the appropriate reason from the drop-down

### 2. You may populate the **OPTIONAL FIELDS** if desired

### 3. Before submitting the form, **CONFIRM** that all entered details are correct

### 4. Once you are ready to submit the form, click **NEXT**

### 5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

### Audience

Healthcare  
Location Manager

### Tips

For **Doses Insufficient Quantity**, select the number of doses missing from each vial.

### Vaccine Insufficient Quantity

\* Insufficient Quantity Date

Feb 11, 2021

\* Doses Insufficient Quantity

1

\* Reason for Insufficient Quantity

Other

Reason for Insufficient Quantity - Other

Vial was not completely full

Previous **Next**

# Step 5 of 5: Submit the Vaccine Insufficient Quantity Survey form

The **VACCINE INSUFFICIENT QUANTITY RECORD** is now submitted, and your COVID-19 Vaccine Inventory Records will be automatically updated.

- 1. Click **FINISH**
- 2. After you click **FINISH**, you will see the Vaccine Insufficient Quantity record displayed on the **ALL INSUFFICIENT QUANTITIES LIST VIEW**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Vaccine Insufficient Quantity

Insufficient quantity event for the chosen vaccines have been created.

Finish

Insufficient Quantities

All Insufficient Quantities

48 items • Sorted by Created Date • Filtered by All insufficient quantities • Updated 2 minutes ago

Search this list...

Settings

Table

Refresh

Print

Filter

Insufficient ...	Vaccine Inventory	Insuffic...	Dos...	Reason for Insufficient Quantity	Reason for Insufficient Quantity - ...	Created Date
1	INSUFF-00097	Delivery 02/12/2021	2/15/2021	1	Moderna (9 doses obtained from vial, expected 10)	2/15/2021, 11:29 AM
2	INSUFF-00096	Grace Moderna First Dose Inventory	2/15/2021	1	Moderna (9 doses obtained from vial, expected 10)	2/15/2021, 11:29 AM

## Audience

Healthcare  
Location Manager

## Tips

After clicking **FINISH**, you will see your Vaccine Insufficient Quantity record displayed on the **All Insufficient Quantities List View**.

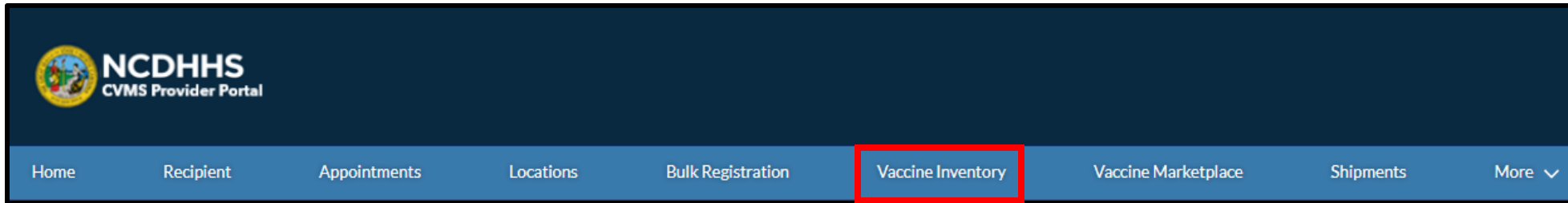


# Edit Deprecation Events

## Step 1 of 4: Navigate to the Vaccine Inventory tab

In the event that a deprecation event was incorrectly entered, the event record can be edited to reflect the corrected information.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



### Audience

Healthcare  
Location Manager

### Tips

The process for editing both Wastage and Insufficient Quantities is identical.

# Step 2 of 4: Select the Vaccine Inventory to be Corrected

1. Search the list
2. Select the Vaccine Inventory Record to edit

## Audience

Healthcare  
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories


All Vaccine Inventories

29 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

	Vaccine I...	NDC (Prod...	Account Na...	Product N...	Lot	To...	Dos...	D...	Ex...	Do...	Status	Expiration ...	Date Recei...	Created Da...	
1	1000 Additional	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	pf10000	10,000	9,999	2	1	0	Available	5/31/2021, 12:...	5/10/2021, 4:2...	5/10/2021, 4:2...	
2	111111 Delive...	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	111111	100	0	0		100	Complete	7/31/2021, 12:...	6/23/2021, 2:1...	6/23/2021, 2:1...	
3	CheckSameOr...	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	11	100	4	0		0	Available	9/30/2021, 12:...	6/25/2021, 4:3...	6/25/2021, 4:3...	
4	Delivery 05/12...	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	PF27521	1,170	1,155	1		14	Available	9/24/2021, 12:...	5/12/2021, 12:...	5/12/2021, 12:...	
5	Delivery 06/11...	59267-1000-02	Training Team ...	Pfizer-BioNTe...	1234567	0	0	0	0	0	Incoming Trans...	1/1/2022, 12:0...		6/11/2021, 11:...	
6	Delivery 06/24...	22222-222-22	Training Team ...	TestVaccine2 (...	1	100	0	2		98	Wasted	6/30/2021, 12:...	6/24/2021, 6:1...	6/24/2021, 6:1...	
7	Delivery 06/25...	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	11	60	40	0	0	0	Available	9/16/2021, 12:...	6/25/2021, 12:...	6/25/2021, 4:3...	
8	EHR Vaccine	59267-1000-03	TestLoc_UAT1	Pfizer-BioNTe...	10021	100	91	9		0	Available	10/14/2021, 1:...	6/17/2021, 12:...	6/17/2021, 1:0...	
9	FED Test3 06/25	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	1231	40	40	0		0	Available	10/13/2021, 1:...	6/25/2021, 11:...	6/25/2021, 11:...	
10	FED-Mod Test	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	Mod112	50	50	0		0	Available	7/31/2021, 12:...	6/28/2021, 11:...	6/28/2021, 11:...	


## Step 3 of 4: Navigate to the Related Tab

 Vaccine Inventory  
111111 Delivery 06/23/2021


Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity
<a href="#">TestLoc_UAT1</a>	100	0	0	100	0


DETAILS

**RELATED**


 Orders (0)


New

 Appointments (0)

 Wastage Events (1)


New

Wastage ID	Doses Wasted	Date Wastage Occurred	Reason for Waste	
<a href="#">WAST-002645</a>	100	6/23/2021	Broken Vial/syringe	
				<a href="#">View All</a>

 Insufficient Quantities (0)

New

**Edit**

1. From the Vaccine Inventory Record, navigate to the **RELATED** Tab
2. Find the deprecation event to edit (under **WASTAGE EVENTS** or **INSUFFICIENT QUANTITIES**)
3. Navigate to the Action Arrow  and click **EDIT**

### Audience

Healthcare  
Location Manager

### Tips

New deprecation events can also be created by clicking **NEW**.

## Step 4 of 4: Complete the Edit

1. Complete the edit(s)
2. Click **SAVE**

Edit WAST-002645

Information

Wastage ID

WAST-002645

Account (Location) Name

TestLoc\_UAT1

\* Date Wastage Occurred

6/23/2021

Doses Wasted

100

Entire vaccine inventory wasted

☐

\* Reason for Waste

Broken Vial/syringe

Vaccine Inventory

111111 Delivery 06/23/2021

Associated Vial Serial No.(s)

Description

System Information

Created By

Darrell Lee, 6/23/2021, 2:15 PM

Last Modified By

Darrell Lee, 6/23/2021, 2:15 PM

Cancel

Save & New

Save

### Audience

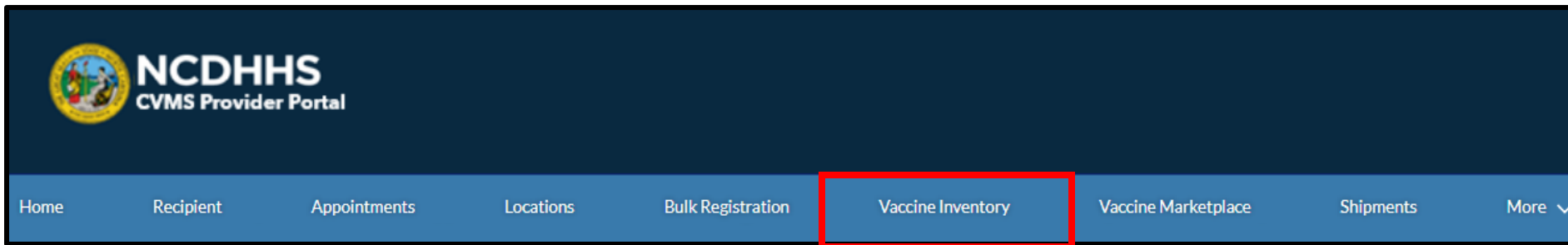
Healthcare  
Location Manager

# Other Inventory Operations Available in CVMS

# **Edit or Update Vaccine Inventory Record Details**

# Step 1 of 3: Navigate to the Vaccine Inventory tab

1. At the top of your home page, locate the **VACCINE INVENTORY** tab
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY** list view



## Audience

Healthcare  
Location  
Manager



# Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH** or **SORT** in the list view.

- 1. Identify the **VACCINE INVENTORY RECORD** that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

7 items • Sorted by Expiration Date (MM/DD/YYYY) • Filtered by All vaccine inventories • Updated a few seconds ago

Delivery 02/09/2021

Vaccine Inven...	Account N...	Product Name	To...	D...	D...	Expiration ...	Date and Tim...	Lot	Status	Usage (First or...	Created Date	
1	Delivery 02/09/2...	Clinic ABC Loc 1	Pfizer-BioNTech ...	0	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	123	Incoming Transfer...	First Dose only (1...	2/9/2021, 12:31 ...

# Step 3 of 3: Update the Vaccine Inventory Record

Before you edit, make sure you are on the appropriate record.

Home	Recipient	Appointments	Locations	Bulk Registration	Vaccine Inventory	Vaccine Marketplace	Shipments	More
<b>Vaccine Inventory</b> Pf1						Request Transfer/Redistribution Change Status <b>Edit</b>		
Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity			
<a href="#">TestLoc_UAT1</a>	1,000	988	13	0	0			

**Edit Pf1**

**Vaccine Inventory Details**

\*Vaccine Product: Pfizer-BioNTech (6 doses/vial) (195 MDV) CO...  
\*Vaccine Inventory Name: Pf1  
\*Lot: pf2021  
\*Account: TestLoc\_UAT1  
\*Expiration Date: 8/31/2021 12:00 PM  
Date Received: 6/2/2021 9:26 AM  
Total Vials: 167  
Pfizer 6 Dose Vial 'Extra Doses' Warning  
Status: Available  
Federal Allocation?  
State Sponsored Contract  
Dose Amounts  
Total Doses: 1,000  
Doses Administered: 13  
Cancel Save & New **Save**

*Remember, you must always save your changes.*

1. Click the **EDIT BUTTON** on the right-hand side
2. Locate the field you want to make changes to
3. Update the field
4. Click **SAVE**
5. If the field does not update, click **REFRESH** and try again

## Audience

Healthcare  
Location  
Manager

## Tips

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.

# Reviewing Vaccine Inventory History

Vaccine Inventory  
Delivery 01/20/2021

Account

Clinic ABC Loc 1

Total Doses

300

Extra Doses

0

Doses Available

280

Doses Administered

20

Do

0

DETAILS

RELATED

Appointments (6+)

New

Appointment	Contact Name	Status	Vaccine Status
00112244	Lonzo Ball	Closed	Dose 1 Administered
00112228	Peter Parker	Closed	Dose 1 Administered
00112225	Anthony Stark	Closed	Dose 1 Administered
00112223	Mariah Carey	Closed	Dose 1 Administered
00112220	Judd Apatow	Closed	Dose 2 Administered
00112217	Mario Lopez	Closed	Dose 2 Administered

View All

Wastage Events (0)

New

Orders (0)

New

Vaccine Inventory History (6+)

Date	Field	User	Original Value	New Value
1/26/2021, 6:50 PM	Date and Time Receiv...	Azalea Troche	1/15/2021, 6:10 PM	1/15/2021, 2:30 AM
1/26/2021, 5:39 PM	Extra Doses	Azalea Troche		0
1/26/2021, 5:00 PM	Doses Administered	sergio.lizano.paniagua	19	20
1/26/2021, 1:11 PM	Doses Administered	sergio.lizano.paniagua	18	19
1/26/2021, 1:00 PM	Doses Administered	sergio.lizano.paniagua	17	18
1/26/2021, 12:30 PM	Doses Administered	sergio.lizano.paniagua	16	17

View All

All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

1. From the Vaccine Inventory Record, click on the **RELATED** tab.
2. Scroll down to **VACCINE INVENTORY HISTORY**
3. Review all Vaccine Inventory History

Click View All to look at all the Vaccine Inventory History changes made to the record.

## Audience

Healthcare  
Location  
Manager



# **Mark a Vaccine Inventory as Complete or Reserved for Future Use**

# Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

- 1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORD** that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

## Audience

Healthcare  
Location  
Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

All Vaccine Inventories

7 items • Sorted by Expiration Date (MM/DD/YYYY) • Filtered by All vaccine inventories • Updated a few seconds ago

Delivery02/09/2021

Vaccine Inven...	Account N...	Product Name	To...	D...	D...	Expiration ...	Date and Tim...	Lot	Status	Usage (First or...	Created Date	
1	Delivery 02/09/2...	Clinic ABC Loc 1	Pfizer-BioNTech ...	0	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	123	Incoming Transfer...	First Dose only (1...	2/9/2021, 12:31 ...

# Step 2 of 3: Click the Change Status Button

- 1. At the top of the Vaccine Inventory page, locate the **CHANGE STATUS** button
- 2. Click the **CHANGE STATUS** button

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Vaccine Inventory

Delivery 02/16/2021

Request Transfer/RedistributionChange StatusEdit

Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity
<a href="#">RPA Location 1</a>	5,000	4,997	3	0	0

DETAILS

RELATED

▼ Vaccine Inventory Details

Vaccine Product

[Pfizer-BioNTech \(5 doses/vial\) \(195 MDV\) COVID-19 Vaccine](#)

Lot

1234567

Expiration Date

4/30/2021, 12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

1,000

Vaccine Inventory Name

Delivery 02/16/2021

Account

[RPA Location 1](#)

Date Received

2/16/2021, 4:21 PM

Status

Available

Federal Allocation

☐

NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

123

## Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the **STATUS**. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate **STATUS**.

1. Select the appropriate **STATUS**
  - Complete
  - Reserved for Future Use
  - Available
  - Transferred
  - Wasted
  - Incoming Transfer in Transit
2. Click **SAVE**

**Change Status**

\* Status  
Complete

<b>Complete (Definition)</b> Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.	<b>Reserved for Future Use (Definition)</b> Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.
<b>Available (Definition)</b> Use when there is a least one dose of this inventory remaining. Only inventory with this status and 'Doses Available > 0' will be shown in the Vaccine Administration flow.	<b>Wasted (Definition)</b> Indicates all doses & vials within this inventory were wasted. Only records with 'Doses Available = 0' can have this status.
<b>Transferred (Definition)</b> Indicates all doses & vials within this inventory were transferred/redistributed to another Location. Only records with 'Doses Available = 0' can have this status.	<b>Transfer in Transit (Definition)</b> Please do NOT manually set this status. Indicates this inventory is an inbound transfer/redistribution that has not yet arrived. The 'Inbound Transfer' button & flow is used to accept the inventory and automatically updates the status to 'Available'.

Cancel Save

### Audience

Healthcare  
Location  
Manager

### Tips

Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.



# Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.

## Audience

Healthcare  
Location  
Manager

Change Status

Review the errors on this page.

\* Status

Complete

Doses Available must equal 0 (zero) to mark this Status=Complete. Please adjust Extra Doses, Doses Administered, and/or Doses Wasted as needed in order for "Doses Available" calculation to indicate a value of 0.

Complete (Definition)

Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.

Reserved for Future Use (Definition)

Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.

Cancel

Save

# Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.

Change Status

\* Status

Complete

Complete (Definition)

Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.

Reserved for Future Use (Definition)

Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.

Available (Definition)

Use when there is a least one dose of this inventory remaining. Only inventory with this status and 'Doses Available > 0' will be shown in the Vaccine Administration flow.

Wasted (Definition)

Indicates all doses & vials within this inventory were wasted. Only records with 'Doses Available = 0' can have this status.

Transferred (Definition)

Indicates all doses & vials within this inventory were transferred/redistributed to another Location. Only records with 'Doses Available = 0' can have this status.

Transfer in Transit (Definition)

Please do NOT manually set this status. Indicates this inventory is an inbound transfer/redistribution that has not yet arrived. The 'Inbound Transfer' button & flow is used to accept the inventory and automatically updates the status to 'Available'.

Cancel

Save

## Audience

Healthcare  
Location  
Manager

## Tips

This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).

# **Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory Record**

# Step 1 of 4: Navigate to Vaccine Inventory Record to Consolidate

To reduce the number of vaccine inventory records and to aid with vaccine management, all inventory records for the same product from the same lot can have the available doses consolidated into a single record. To do so, follow these instructions:

- 1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORDS** that you wish to increase with available doses from other inventory records
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK** to open it

## Audience

Healthcare  
Location  
Manager

## Tips

Use the search feature to search the lot number. The recommended best practice of entering the lot number to each vaccine inventory name helps ensure that all inventory records from the desired lot to consolidate will be displayed.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

3 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a minute ago

555

	Vaccine Inve...	NDC (Prod...	Account ...	Product Name	Lot	To...	D...	D...	Ex...	D...	Stat...	Expiration Date	Date Received	Created Date	
1	Lot 555 Pfizer 6-do...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6 ...	555	600	597	0		3	Availab...	12/31/2021, 12:00...	7/26/2021, 2:04 P...	7/26/2021, 2:05 P...	
2	Lot 555 Pfizer 6-do...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6 ...	555	600	599	0		0	Availab...	12/31/2021, 12:00...	7/26/2021, 2:05 P...	7/26/2021, 2:06 P...	
3	Lot 555 Pfizer 6-do...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6 ...	555	1,200	1,193	0		6	Availab...	12/31/2021, 12:00...	7/26/2021, 2:18 P...	7/26/2021, 2:19 P...	

# Step 2 of 4: Open the Consolidate Available Doses Feature

- 1. Click on **CONSOLIDATE AVAILABLE DOSES**

Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Vaccine Inventory

Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 2

Request Transfer/RedistributionChange StatusEdit

Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity
TestLoc_UAT1	600	599	0	0	1

DETAILS

RELATED

Consolidate Available Doses

# Step 3 of 4: Consolidate the Records

- 1. Select the **VACCINE INVENTORY NAME** for the record(s) to consolidate
- 2. Click **FINISH**
- 3. Repeat Step 2 and 3 if you wish to consolidate more records
- 4. The inventory selected in this step will have its number of Available Doses reduced to 0, while the available doses of the inventory selected in the previous step will be increased by the same amount.

## Audience

Healthcare  
Location  
Manager

## Tips

If consolidating State and Federal allocations, make sure to consolidate doses **FROM** the Federal Vaccine Inventory record **TO** the State Vaccine Inventory Record.

Consolidate Available Doses

From Vaccine Inventory:  
Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 2

To Vaccine Inventory Name:  

Search Vaccine Inventories...

Account Name:  
TestLoc\_UAT1

Lot:  
555

Doses Available:  
599

Federal Allocation:  
false

Reminder (Consolidate Available Doses):  
To consolidate the Doses Available the Vaccine Inventory records must have identical Account Name, Lot, and Federal Allocation values.

Cancel

Finish

To Vaccine Inventory Name:

Search Vaccine Inventories...

Lot 555 Pfizer 6-dose Delivery 07/26/2021  
555 • Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine • TestLoc\_UAT1

Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 3  
555 • Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine • TestLoc\_UAT1

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HUMAN SERVICES

130

# Step 4 of 4: Check Consolidated Inventories

After the records have been consolidated, the available doses are all transferred from the other records.

Notice that those vaccine inventory records still exist and still maintain their own history to include deprecation events. These records can now be marked as “complete”.

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

3 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated 6 minutes ago

555

	Vaccine Inventory Name	NDC (Prod...	Account ...	Product Name	Lot	To...	D...	D...	Ex...	D...	Stat...	Expiration Date	Date Received	Created Date
1	Lot 555 Pfizer 6-dose Deliver...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6...	555	2,392	2,389	0		3	Availab...	12/31/2021, 12:00...	7/26/2021, 2:04 PM	7/26/2021, 2:05 P...
2	Lot 555 Pfizer 6-dose Deliver...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6...	555	1	0	0	0	0	Availab...	12/31/2021, 12:00...	7/26/2021, 2:05 PM	7/26/2021, 2:06 P...
3	Lot 555 Pfizer 6-dose Deliver...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6...	555	7	0	0	0	6	Availab...	12/31/2021, 12:00...	7/26/2021, 2:18 PM	7/26/2021, 2:19 P...

# Access the Vaccine Inventory Consolidations Report

The Vaccine Inventory Consolidations report displays all lot consolidations performed at all locations for which the user has access.

- 1. Navigate to the **MORE** tab and select **REPORTS**
- 2. On the left, select **ALL REPORTS**
- 3. Click on the **VACCINE INVENTORY CONSOLIDATIONS REPORT**

## Audience

Healthcare  
Location  
Manager

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal>.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

ReportsAll Reports10 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name	Description	Folder	Created By	Created On
Marketplace Inquiries	All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'	Provider Reports	Copado Integration User	7/16/2021, 2:38 AM
Missing & Undetermined Hubs	Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned	Vaccine Marketplace Reports	Copado Integration User	7/19/2021, 5:44 PM
Recipient Vaccination Report	This report shows the completed vaccine administration details for the current logged in user's location(s).	Provider Reports	George Jaramillo	1/31/2021, 11:08 PM
Vaccine Inventory Consolidations	Summary of all Lot Consolidations performed at all Accounts/Locations for which the user has access.	Provider Reports	Copado Integration User	7/16/2021, 2:38 AM



# Access the Vaccine Inventory Consolidations Report (Continued)

This report will allow you to trace how many available doses were moved from an inventory record to another.

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Report: Vaccine Inventories with Lot Consolidation Audit Logs

Vaccine Inventory Consolidations

Summary of all Lot Consolidations performed at all Accounts/Locations for which the user has access.

Search

Add Chart

Filter


Refresh

Export

Total RecordsTotal # Doses Consolidated (Actual)Total Consolidate All Available Dos...

31,8023

	Lot Consolidation Audit Log: Lot Consolidation Audit Log Name	# Doses Consolidated (Actual)	Lot	Vaccine Inventory Name	Vaccine Inventory (To/Increment)	Account Name	Lot Consolidation
1	LOTCONS-0003	10	10	Delivery 07/23/2021	RegressionTestInvTC01	TestLoc_UAT1	
2	LOTCONS-0005	599	555	Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 2	Lot 555 Pfizer 6-dose Delivery 07/26/2021	TestLoc_UAT1	
3	LOTCONS-0006	1,193	555	Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 3	Lot 555 Pfizer 6-dose Delivery 07/26/2021	TestLoc_UAT1	
4		1,802					



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HUMAN SERVICES

133

# **Receive State Sponsored Contract Inventories**

# Receiving State Sponsored Contract Inventories

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A **state sponsored contract inventory** is an inventory specifically earmarked for state sponsored vendor events. The intent of tagging a vaccine inventory as a State Sponsored Contract is to allow it to be used for traditionally marginalized and underserved communities, which primarily will allow it to be used for recipient's that need to be vaccinated in their homes. For most vaccine inventory records in CVMS, the State Sponsored Contract checkbox will be unchecked. If the state designates an inventory as a State Sponsored Contract, the following procedures should be followed.

**If the option to mark the inventory is not available, please contact the COVID-19 Vaccine Provider Help Desk (see slide 2 of this user guide for contact instructions).**

## Audience

Healthcare  
Location  
Manager

# Step 1 of 2: Navigate to the Vaccine Inventory Tab

To declare a new Vaccine Inventory record as a **State Sponsored Contract**:

- 1. Click **ADD** from the Vaccine Inventory Tab

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer


Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Vaccine Inv...	Account N...	Product Name	To...	D...	D...	Expiration Da...	Date and Tim...	Lot	Status	Usage (First o...	Created Date
----------------	--------------	--------------	-------	------	------	------------------	-----------------	-----	--------	-------------------	--------------



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136

# Step 2 of 2: Complete New Vaccine Inventory Record Form

- 1. Populate all required **VACCINE INVENTORY FIELDS**
- 2. Add the label **SSC -** to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.  
*Note:* This is a required labeling standard for ALL State Sponsored Contracts (e.g., “SSC – Delivery”)
- 3. Check the **STATE SPONSORED CONTRACT** Checkbox
- 4. Click **SAVE**

New Vaccine Inventory: New Vaccine

Fields

\* Account ⓘ

Search Accounts...

\* Expiration Date

Date

Time

\* Vaccine Product

Search Vaccine Products...

\* Lot

\* Usage (First or Second Doses) ⓘ

--None--

\* Vaccine Inventory Name

SSC - Delivery 04/28/2021

Date Received

Date

4/28/2021

Time

12:22 PM

\* Total Doses ⓘ

Extra Doses ⓘ

Federal Allocation? ⓘ

☐

State Sponsored Contract ⓘ

☒

Shipment Details

Shipment

Search Shipment...

Unable to locate Shipment record ⓘ

☐

Comments/Notes (Optional)

Cancel

Save & New

Save

## Audience

Healthcare  
Location  
Manager

## Tips

Remember that it is a best practice to always add the LOT NUMBER to all vaccine inventory names.

# **Access the Inventory Summary Report**

# Accessing the Inventory Summary Report

The Inventory Summary Report is available for you to view the status of all vaccine inventories in CVMS for all locations for which you are assigned as a Healthcare Location Manager.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **INVENTORY SUMMARY REPORT**

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

Reports

All Reports

10 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name	Description	Folder	Created By	Created On
Inventory Summary Report	This report allows users to view their location(s) vaccine inventories.	Provider Reports	George Jaramillo	2/1/2021, 12:02 AM
Marketplace Inquiries	All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'	Provider Reports	Copado Integration User	7/16/2021, 2:38 AM
Missing & Undetermined Hubs	Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned	Vaccine Marketplace Reports	Copado Integration User	7/19/2021, 5:44 PM
Recipient Vaccination Report	This report shows the completed vaccine administration details for the current logged in user's location(s).	Provider Reports	George Jaramillo	1/31/2021, 11:08 PM
Summary of all Lot Consolidations				

Organization Management

Help & Information

Reports

Account Management

Files

# Accessing the Inventory Summary Report (Continued)

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Report: Vaccine Inventory with Order and Shipment fields

Inventory Summary Report

This report allows users to view their location(s) vaccine inventories.

Total Records

66

Total Doses Available

35,423

Total Doses Administered

50

Total Doses Transferred

4,132

Total Doses Wasted

385

Total Doses Insufficient Quantity

57

Total Total Doses

39,338

Total Extra Doses

709

<input type="checkbox"/> Account: Account Name	Vaccine Inventory Name	Lot	Product	NDC (Product)	Expiration Date	Date Received	Status	Doses Available
<input type="checkbox"/> Solutions Loc1 (40)	Lot 432 Delivery 02/26/2021	Lot 432	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	2/26/2021, 10:20 AM	Available	
	FED Lot 999 Delivery 03/03/2021	Lot 999	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/3/2021, 10:24 AM	Available	
	# GFS Lot 456 - Delivery 02/19/2021	456	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	7/24/2021, 12:00 PM	2/19/2021, 4:59 PM	Available	
	Lot 123 - Delivery 02/19/2021	123	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	8/13/2021, 12:00 PM	2/19/2021, 4:57 PM	Available	
	FED Delivery 03/04/2021 Lot 4444	4444	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	3/31/2022, 12:00 PM	3/4/2021, 4:05 PM	Available	
	Delivery 03/09/2021	Mod123	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	9/30/2021, 12:00 PM	3/9/2021, 9:32 AM	Available	
	Delivery 03/09/2021	Lot UA 8975	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/9/2021, 12:00 PM	Available	
	Lot 555 Delivery 03/10/2021	Lot 555	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/10/2021, 10:21 AM	Available	
	Lot 5432 Delivery 03/11/2021 2nd	Lot 5432	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	7/31/2021, 12:00 PM	3/11/2021, 2:22 PM	Available	
	FED Delivery 03/05/2021	4444	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	12/31/2021, 12:00 PM	3/5/2021, 12:38 PM	Available	
	Lot 6666666 Delivery 03/08/2021	6666666	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	10/7/2021, 12:00 PM	3/8/2021, 2:52 PM	Available	
	Lot 789 Delivery 03/04/2021	Lot 789	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/4/2021, 2:26 PM	Available	
	Delivery 03/01/2021	777	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	5/6/2021, 12:00 PM	3/1/2021, 1:54 PM	Available	

Row Counts

☒ Detail Rows

☒ Subtotals

☒ Grand Total

## Audience

Healthcare  
Location  
Manager

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal>.



# Appendix

# Key Terms

## Vaccine Inventory Shipment details

Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).

## Extra Doses

Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.

## Redistribution

Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

## Transfer

Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

## Spoilage

Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.

## Wastage

Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.

## Insufficient Quantity

COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type is able to be administered to recipients.

# CVMS Steps For Providers






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- ✓ Step 1 - Register your organization
- ✓ Step 2 - Register each vaccine location and all prescribing providers who will administer vaccine
- ✓ Step 3 - Obtain NCID credentials
- ✓ Step 4 - Create user accounts for your organization's CVMS users
- ✓ Step 5 - Navigate the CVMS Provider Portal
- ✓ Step 6 - Receive and manage vaccine inventories
- ☐ Step 7 - Add locations to the find a vaccine location website
- ☐ Step 8 - Invite recipients to register in the COVID-19 Vaccine Portal
- ☐ Step 9 - Invite recipients to self-schedule their appointments (optional)
- ☐ Step 10 - Check-in recipients and document vaccination

# Additional Notes

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## Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- **\* Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

## Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see [https://help.salesforce.com/articleView?id=getstart\\_browsers\\_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

# User Guide Change Log

Version	Date of Change	Changes Made	Author
1	12/21/2020	<ul style="list-style-type: none"> <li>Initial document</li> </ul>	Azalea Troche
2	1/10/2021	<ul style="list-style-type: none"> <li>Updated shipment email notification</li> <li>New slides on List Views and Account (Location) Record</li> <li>Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information</li> <li>Tips on adding inventories</li> </ul>	Courtney Seward
3	1/13/2021	<ul style="list-style-type: none"> <li>Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21. The CVMS Help Desk Portal screenshot was also added.</li> </ul>	Courtney Seward
4	1/17/2021	<ul style="list-style-type: none"> <li>Updated navigation bar.</li> <li>Updated the terms for Redistribution and Transfer</li> </ul>	Azalea Troche & Courtney Seward
5	1/21/2021	<ul style="list-style-type: none"> <li>Added a tip</li> <li>Extra Doses</li> <li>Complete Vaccine Inventory</li> </ul>	Courtney Seward & Linda Wade
6	1/27/2021	<ul style="list-style-type: none"> <li>Updated Navigation Bar screen shots to show reports tab</li> </ul>	Kristin Clark
7	2/4/2021	<ul style="list-style-type: none"> <li>Updated CVMS Help Desk Portal Screenshot</li> <li>Updated Declare Vaccine Allocation Availability Section</li> </ul>	Courtney Seward
8	2/15/2021	<ul style="list-style-type: none"> <li>Updated Vaccine Allocation Availability section</li> <li>Added Insufficient Quantity Definitions</li> <li>Added Insufficient Quantity Section</li> <li>Updated screenshots to match new branding</li> </ul>	Tabitha McKelvy Steve DiGangi Nicholas Rinz
9	3/2/2021	<ul style="list-style-type: none"> <li>Updated wording for Jansen Vaccine</li> <li>Added federal allocation slide</li> </ul>	Nicholas M. Rinz
10	3/10/2021	<ul style="list-style-type: none"> <li>Updated screenshots</li> <li>Federal Allocation for non-FQHC or FEMA sites</li> <li>Update Change Allocation Status tips and default status</li> </ul>	Nicholas M. Rinz

# User Guide Change Log (continued)

Version	Date of Change	Changes Made	Author
11	04/26/2021	<ul style="list-style-type: none"> <li>Updated screenshot to include “Location” menu</li> <li>Added tip to do separate transfers for 1<sup>st</sup> and 2<sup>nd</sup> doses; 2<sup>nd</sup> dose should follow in approximately 3 weeks</li> <li>Updated Step 7 to include 1<sup>st</sup> or 2<sup>nd</sup> dose to reason; updated screenshot to show example</li> <li>Added continuation slide for Change Log</li> <li>New HCP Roles Report screenshot</li> </ul>	Darrell Lee
12	05/14/2021	<ul style="list-style-type: none"> <li>Removed references to 1<sup>st</sup> and 2<sup>nd</sup> dose tagging</li> <li>Updated screenshots and addition of SSC</li> <li>Remove reference to Usage (1st/2nd dose)</li> </ul>	Darrell Lee
13	06/11/2021	<ul style="list-style-type: none"> <li>Added Vaccine Marketplace to overview</li> <li>Updated screenshots to include Vaccine Marketplace tab</li> <li>Added Vaccine Marketplace Instructions</li> <li>Note added for Pfizer 6-dose not being eligible for extra doses</li> </ul>	Darrell Lee
14	07/01/2021	<ul style="list-style-type: none"> <li>Introduced Hubs</li> <li>Added a step about contacting the Hub</li> <li>Added auto-update of available inventories</li> <li>Added Additional steps to check listings posted by the assigned hub</li> <li>Updated screenshots</li> <li>Added Finding Associated Hub</li> <li>Added the 3 rules that will make a listing auto-lapse</li> <li>Updated new wastage drop-down and added tip</li> </ul>	Darrell Lee
15	07/15/2021	<ul style="list-style-type: none"> <li>Updated Hubs</li> <li>Added step for viewing inquiries</li> <li>Added step for Inactivation Reason</li> <li>Added step for Creating an Inquiry</li> <li>Added step for Inactivation Reason</li> <li>Added Edit Deprecation Event section</li> </ul>	Darrell Lee

# User Guide Change Log (continued)

Version	Date of Change	Changes Made	Author
16	07/26/2021	<ul style="list-style-type: none"> <li>• Merged 2 user guides in this new format</li> <li>• 3-4: updated table of contents</li> <li>• 127-133: Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory</li> <li>• 35-36, 68-69, 132-133, 143-145: Added slides for reports for individual sections</li> </ul>	Vanessa Kemajou Darrell Lee
17	08/25/2021	<ul style="list-style-type: none"> <li>• 18: Updated screenshot to eliminate Federal Allocation</li> <li>• 20, 34, 80: Updates screenshots</li> <li>• 39, 40: New tips added to address searching by hubs first</li> <li>• 80: New guidance for entering locations in CVMS but not associated with same account</li> <li>• 81: New guidance for adherence to Expiration Date Communication</li> <li>• Removed Federal Allocation section</li> </ul>	Darrell Lee
18	09/15/2021	<ul style="list-style-type: none"> <li>• Help desk hours updated</li> </ul>	Kaitlin Gates